## CONTENTS

CONTENTS

REPORTING



AGENT



BILLING



DTP



GIFT



RENEWAL



GLOSSARY



REPORT SAMPLES

Integrated Marketing Technology is an application service provider (ASP) founded in 1993 to be the premier provider of integrated marketing consulting and database services to subscription and membership-based marketing companies. IMT's mission is to allow businesses to make faster, more informed, and more strategic decisions through its sophisticated technology tools and marketing services.

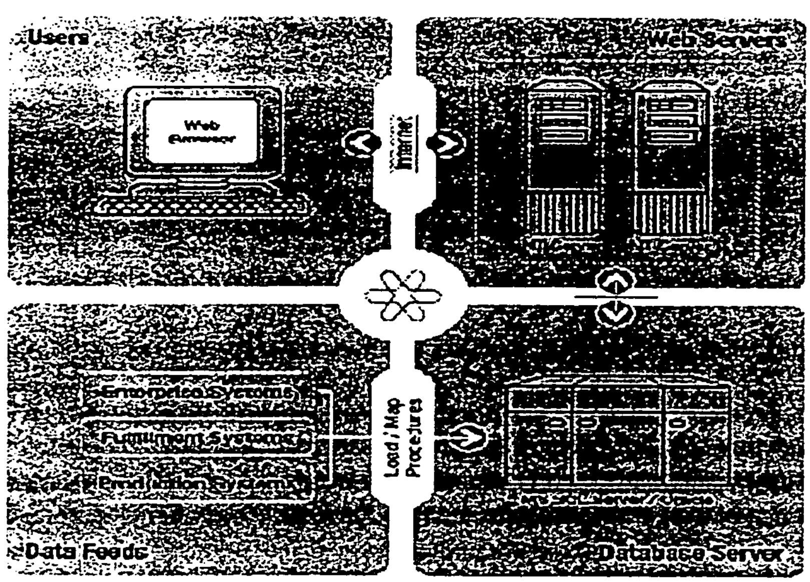
**"Information at Your Fingertips"**
We provide actionable marketing information directly to the people who have their finger on the pulse of the business. It's the only way to turn raw data into knowledge, and it's the key to our company's, and our client's, success. IMT's systems allow instant, real-time access to critical corporate data and analysis – from high-level assessment of sales channels to detailed evaluation of individual campaigns or lists.

A flexible and powerful web-based application requiring no specialized hardware or software, IMT Reporting offers companies accurate and consistent analysis of their marketing initiatives. IMT Reporting provides highly segmented, clearly defined marketing analysis at almost any level – from source channel to campaign to list.

**The Benefits:**

- Proven, insightful customer acquisition and retention analysis
- Improved Lifetime customer value reporting
- Channel ranking and analysis based on order volume and profitability
- Multi-contract customer depletion analysis
- Consistent interpretation of data
- Cross-product, cross-organizational reporting
- Full historical marketing information and analysis
- Improved marketing ROI
- Dramatic cost savings

Through IMT's Internet-based reporting products, marketers have more control over when they receive and disperse critical marketing data. Businesses can decide whether they want to receive daily or weekly data feeds from order processing and fulfillment operations systems. Whatever frequency they choose, they will get this information in real time.



**PC Computers**

- An Intel• i486• or Pentium• processor – based computer (Pentium recommended), Microsoft Windows 95, Windows 98, or Windows NT• 4.0 with service Pack 3 or later, 16 MB of RAM on Windows 95 and Windows 98, 24 MB of RAM for Windows NT (32 MB recommended) and Hard drive with at least 75 MB of available space.

**Mac Computers**

- Apple Power Macintosh computer, Apple System Software version 8.6 or later, 6 MB of RAM (12 MB recommended) and Hard Drive with at least 75 MB of available space.

**Other Hardware Requirements / Recommendations**

- Monitor -- Size: 15" or larger (recommended), Color: 256 or higher (i.e.16 bit), Screen Area: 800 x 600 (recommended 1024 x 768), Keyboard - American Standard 101 key, Pointing Devices - Mouse or Track ball, Local or Networked Laser Printer – Paper Size: 8 ½ x 11 " + Orientation: Landscape

**Recommended Software**

- Email program - communicate with ClientServices@IMTnetwork.com & Support@IMTnetwork.com
- Spread Sheet program – export data from IMT Reporting (i.e. charts)

**Internet Connection**

- Via Modem: Dial-up 56K (minimum)
- Via DSL / ISDN / T-1 = Local Area Network (recommended)

**Browser Check and Installation Internet Explorer (IE)**.

- IMT Reporting is best viewed through Internet Explorer 5.0, available for both PCs and Macintosh computers. The system requirement for loading Explorer 5.0 is as follows:
- **NOTE:** I.E.4.0, will work with basic features

**Step 1 – Check your system for Internet Explorer 5.0, confirm the version you're running.**

- Start Explorer
- Click on **Help** located on the menu bar
- Click on **About Internet Explorer** and a new window will open
- Verify the version number.
- If the versions number is 5.0 or later, then go to Step 3.

**Step 2 – If the version number is less than 5.0, or if you do not have Explorer installed on your computer,** then go to Microsoft's web site and follow the upgrade or installation instructions, or contact your IT department to have Internet Explore 5.0 installed.

< http://www.microsoft.com/windows/ie/default.htm >

**Step 3 – Configuring Internet Explorer 5.0**

- Start Explorer
- Click on **Tools** located on the menu bar
- Click on **Internet Options** and a new window will open
- Click on **Settings** for **Temporary Internet Files** located on the **General Tab**
- Click on **Every visit to page** located below **Check for newer versions of stored pages**
- Click on **OK**
- Click on **Apply** then **OK** on the **Internet Options** window
- Test your access by going to < http://www.IMTnetwork.com/ > and logging onto the system by clicking **Client Center**, and enter username and password (case sensitive) to successfully log onto the system.

**IMT Reporting** has two main components: **Admin** and **Reporting. Admin** generally refers to the administration processes, such as assigning promotion keys to specific **sources, campaigns** and **panels.**

### What You Need to Get Started?

- Authorize IMT to accept data feeds weekly from your fulfillment house (FTP recommended).
- Gather all documentation and materials normally required to prepare detailed reports:
    - **Source Names** (source ID)
    - **Campaign:** Names, Start Dates, Types and Expense detail
    - **Panel:** Names, Start Dates, Test Types and Package Types
    - **Key:** Mail Qty, List Names

| | |
|---|---|
| **NOTE:** | Data is not available until an order is received by your fulfillment house and has activated the Keys; you need to be aware of this timing if you want to assign keys. When keys are not active, you can set up the rest of the campaign so that when they do become active you can assign them and begin using IMT Reporting immediately. |

### Develop a Strategy

It is recommended that you map out how you will organize, define and name your sources, campaigns and panels before using Admin. Organizing this before hand will make for consistent reporting.

While adding records, you will be required to input certain fields (i.e. **Campaign Name**). Other fields may be optional (i.e. **Campaign Type**). The definition of a campaign may also vary depending on the source of business or the reporting requirements. Your choice of optional fields to populate may depend on the source of business. Generally, the more fields you populate, the richer your reporting capabilities.

### Familiarize yourself with IMT Reporting

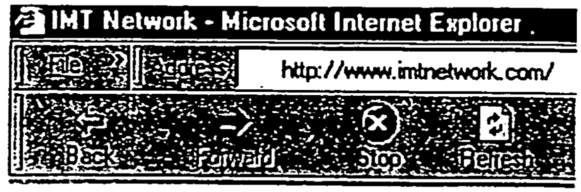
Before getting started, you might want to practice navigating the system. This will help you to better understand the database, and make administration of your campaigns easier and more intuitive. It is helpful to understand how IMT organizes information into hierarchical groups as follows:

1. **GROUP** (i.e. Company Division)
2. **PRODUCT** (i.e. Magazine Title or Product Name)
3. **SOURCE CATEGORY** (i.e. DTP, etc.)
4. **SOURCE** (i.e. Inserts, etc.)
5. **CAMPAIGN NAME** (i.e. 2000-01)
6. **PANEL NAME** (i.e. 01. Sub 12/$12)
7. **PROMOTION KEY** (i.e. 41B2_12/01/2000)

### One-on-One Walk-Through of IMT Reporting

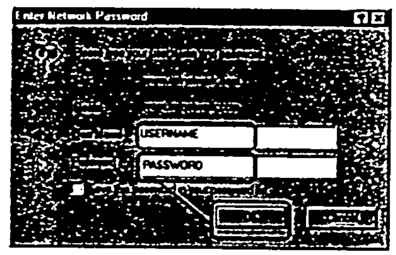
If you want to see examples of campaigns that are already setup in the system, you might want to look at IMT's demo database. For a one-on-one walk-through of IMT's demo database, please request a demo username and password at: ClientServices@imtnetwork.com, name the subject of your email: **demo request** or call us at 415.352.2370.

**Step – 1:** Open your **Browser** and input IMT's URL (Internet Home Page address) (**NOTE:** once you are viewing the home page, right click your mouse and select **Create Shortcut**):

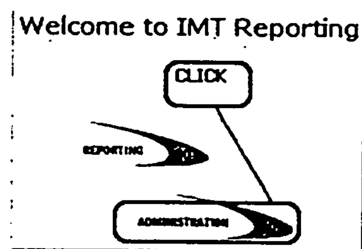



**Step – 2:** Click **Client Center** to reach secure log in box:

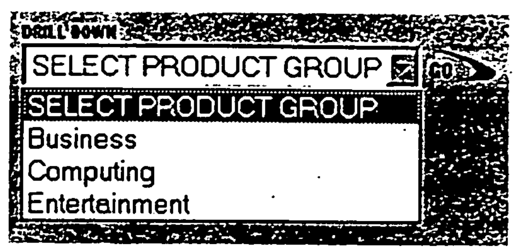

**Step – 3:** Input your **Username & Password:** (**NOTE:** case sensitive; i.e. a or A)



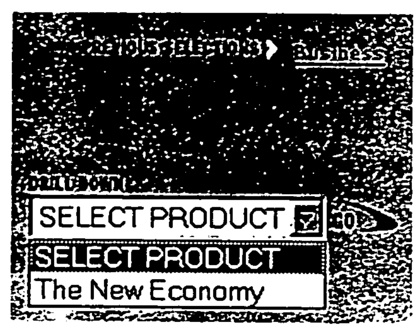

**Step – 4:** Click on **Administration** to begin building and managing campaigns:

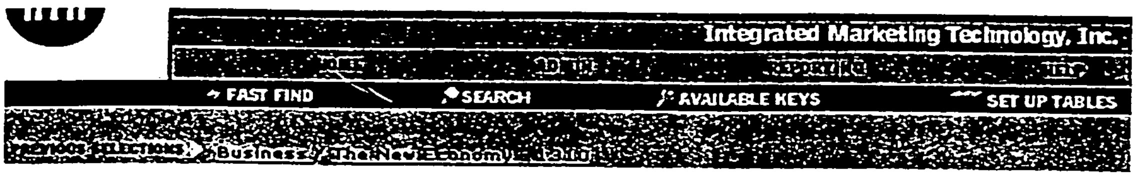



**Step – 5: Select Product Group** (i.e. Business):




**Step – 6: Select Product** (i.e. The New Economy):

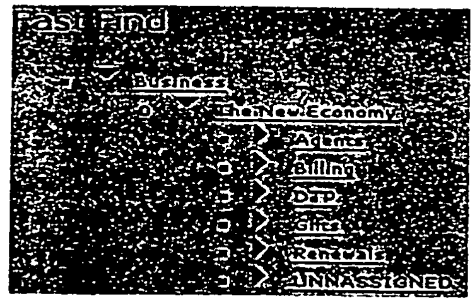





Once you have accessed IMT Reporting, you will now be able to view the Tool Bar (located across the top of the screen). Before building campaigns, you should familiarize yourself with the Tool Bar features and understand how they will assist with the administration and reporting processes.

**Fast Find** – Allows you to navigate the database using a drill-down tree.

- **Drill-down** into Product Group, Product, Source Category, Source, Campaign, and Panel by clicking on ▸ to open the next table below.
- **Open view** of table by clicking table name (i.e. <u>**DTP**</u> to open tables in DTP)




**Search** – Allows you to search for specific sources, campaigns and panels by group name and key words.

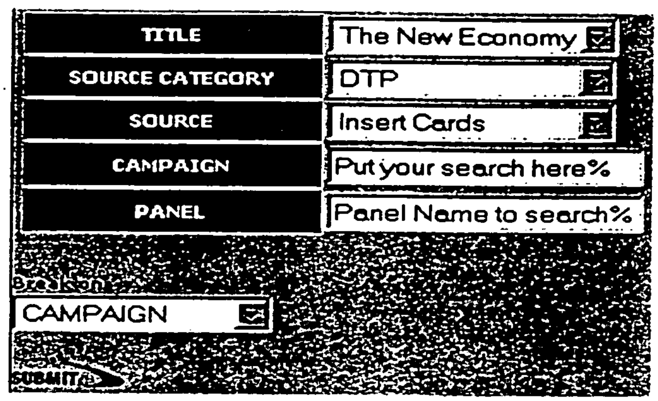
- Select one **Title / Product**
- Select **Source Category**
- Select **Source**

**NOTE:** the **%** will open the search parameters

- Select **Campaign** – input before **%**
- Select **Panel** – input before **%**
- Select Break on **Campaign** – list of campaigns

**or**

- Select Break on **Panel** – list of panels within a campaign




**Available Keys** – Allows you to filter and search the available key list (List of all "un-assigned" keys for the product you are accessing).

- Start with position **#1** – **Source Code** (i.e. 4 = Insert Cards)
- Click **GO**

**NOTE:** Each position (1-10) will accept an alphanumeric entry; use all 10 or a minimum of 1 to filter your search.

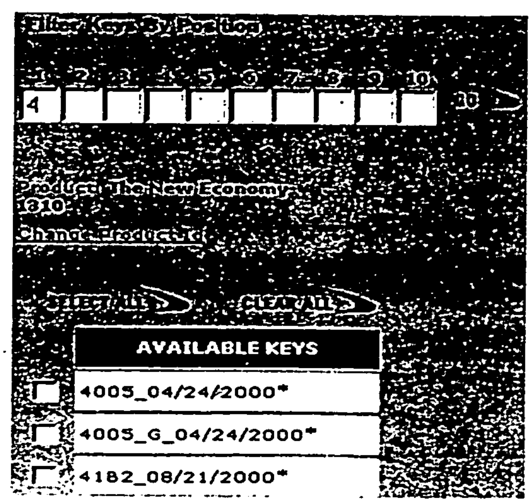


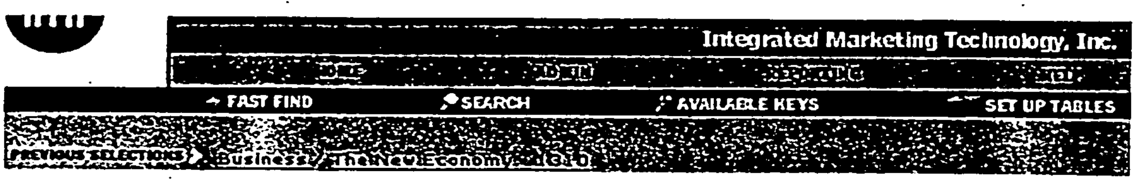
Chart of **Setup Tables** and associated database tables, to which they apply:

- **Create** the tables shaded below prior to building campaigns
- **C = Corporate Setup Table**: will assign across a group of products
- **P = Product Setup Table**: will assign across individual products

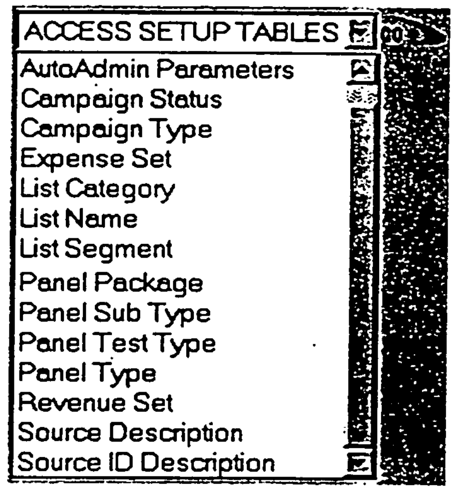
In addition to allowing you to associate keys to sources, campaign and panels, IMT Reporting provides the ability to attach additional information to a source key/promotion key (i.e. user may want to associate specific list selections to direct mail source keys).

| SETUP TABLE | DEFINITION | EXAMPLE | CAMPAIGN TABLE | PANEL TABLE | KEY TABLE | C/P |
|---|---|---|---|---|---|---|
| **AutoAdmin Parameters** | *See the pages listed* | • Pages: 19 - 28 | ☑ | ☑ | ☑ | P |
| **Campaign Status:** | Define the activity of a Campaign | • Active<br>• Closed<br>• Pending | ☑ | | | P |
| **Campaign Type:** | A broad type classification of a Campaign which is user defined and can differ between sources | • Winter DM<br>• Hotline | ☑ | | | P |
| **Expense Set:** | A set of expenses which can be applied to a Campaign, Panel, or Key | • 2000-01 DM 6x9 Package Exp.<br>• Triple Insert Exp. | ☑ | ☑ | ☑ | P |
| **List Category:** | A broad category of related lists | • Home<br>• Sports | | | ☑ | P |
| **List Name:** | ID to define the list | • Tattooing Weekly<br>• Money Monthly | | | ☑ | P |
| **List Segment:** | A specific selection from a list | • Paid Subs<br>• 3 Month Buyers | | | ☑ | P |
| **Panel Package:** | Define the type/style of a package | • 6x9 Control<br>• #10 Sweeps | | ☑ | ☑ | P |
| **Panel Subtype:** | Further define another field for a Panel. | • Sweepstakes<br>• Newsstand | | ☑ | | C |
| **Panel Test Type:** | Define the type of test | • Price<br>• Offer | | ☑ | | C |
| **Panel Type:** | Define the type of Panel | • Control<br>• Test | | ☑ | | C |
| **Revenue Set:** | Revenue over and above subscription revenue, applied to a Campaign, Panel, or Key | • List Rental Revenue<br>• Advertising Revenue | ☑ | ☑ | ☑ | P |
| **Source Description:** | Define a specific channel of sale | • Direct Mail<br>• Renewals | ☑ | ☑ | ☑ | C |
| **Source ID Description:** | Allow you to define a source beyond the one character fulfillment source description. Descriptions are used in reporting. | • D or 2 = Direct Mail | ☑ | ☑ | ☑ | C/P |

| NOTE: | To define one of the **Setup Table** fields – review instructions on **page 10.** |
|---|---|



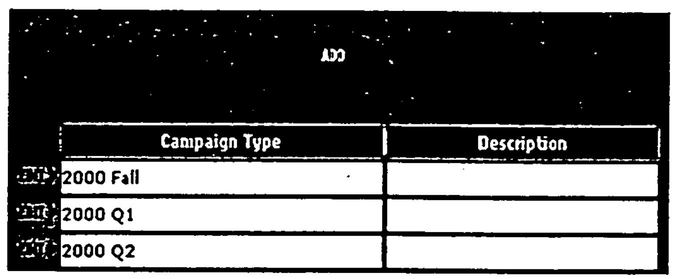

Each product has unique features and the **Setup Tables** are used to define campaigns, panels, or keys with detailed information that will allow your reports to produce a more valuable result (stronger and easier to read).




**Step – 1** Access **Setup Tables**

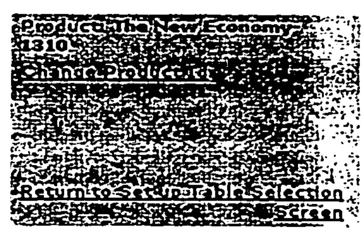
- Click **Setup Tables** located on the **IMT Tool Bar** (**NOTE:** You can access setup tables at any point in the administration process, after you have selected a product; as shown in tool bar figure at the top of this page).

**Step – 2** Select the title / product and setup table you wish to edit. When product is not selected, a prompt will appear.



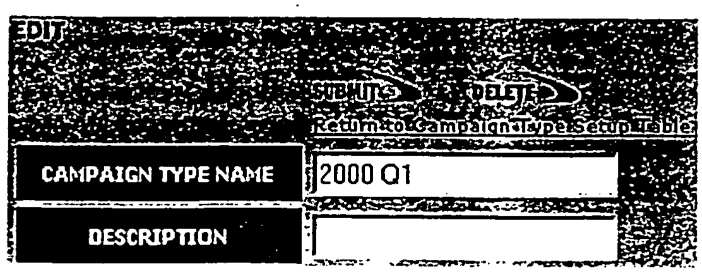

**Step – 3 ADD** new record(s) by clicking **ADD** button (located at the top of each Table).

- Input your definition into the available field.
- **Submit** and this will populate that Table so you can make a selection from the new record(s) when you build your campaign(s).




**NOTE:**

- Click on **Change Product ID**, this link will allow you to move from product to product while still being in the selected Setup Table.
- Click on **Return to Setup Table Selection Screen,** this link will take you back to Step-2

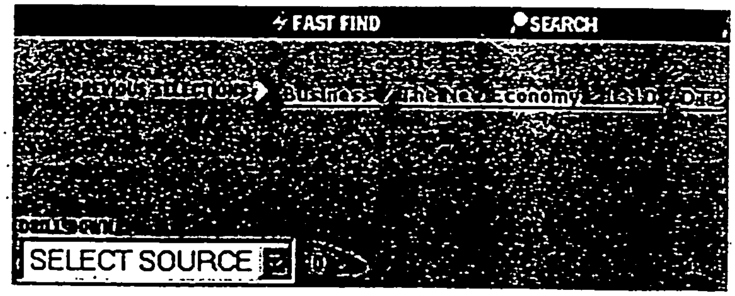


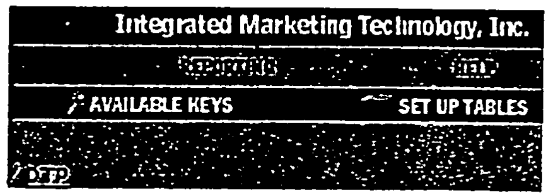

**Step – 4 EDIT** existing records by clicking **EDIT** button (located at the left of each Table definition that exists)

- Input changes
- **Submit**

## STEP 1 - ADD SOURCE

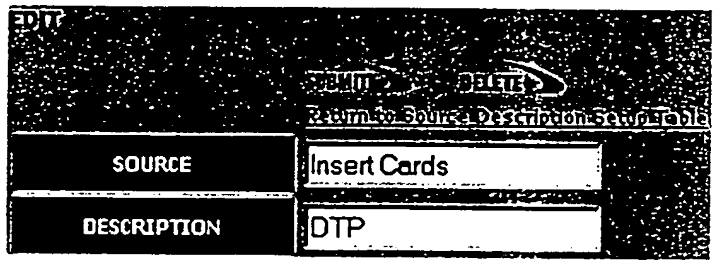
**1.** Select a **Product Group, Product & Source Category** (i.e. Business/The New Economy/DTP)



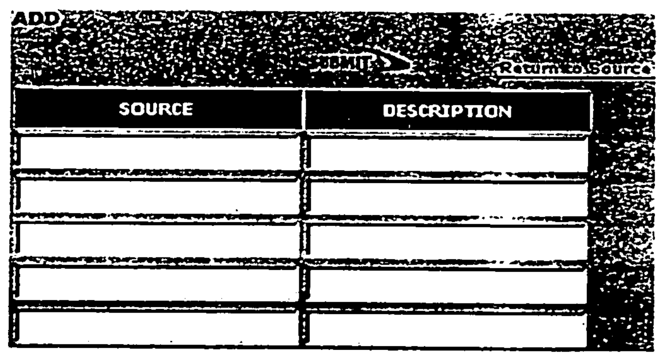

**2.** Define **Source**(s)

- Locate the **IMT Tool Bar** and click on **Setup Table** (window #2 will open)
- Select **Source Description**
- **Add** or **Edit** per instructions on the previous **page 10**
- **Submit** to enter and save your information
- Close Setup Table (#2) window



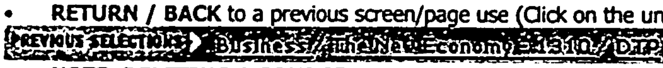

**3. Add** new **Source**(s) (return to main window #1)

- Click **Add New**
- Select **Source Name**
- Input a **Source Indicator** (the one digit alpha-numeric code that corresponds to the first position of the source key provided by the fulfillment house (i.e. 4 = Inserts or 0 = Direct Mail)
- **Submit** to enter and save your information



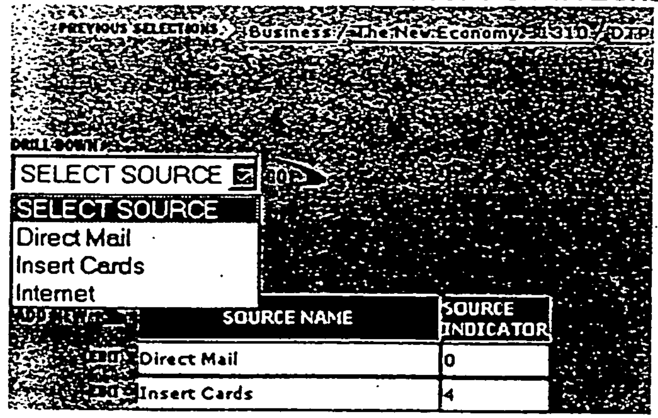

**TIPS:**

- **SUBMIT** button - apply changes to the database.
- **ADD** button - add a record to the database
- **EDIT** button - edit a record in the database.
- **RETURN / BACK** to a previous screen/page use (Click on the underlined link and return)

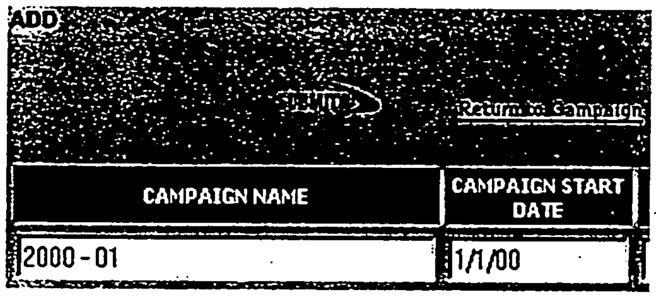


- **NOTE: DELETING A SOURCE**; you must contact IMT directly via **support@imtnetwork.com**

## STEP 2 – ADD OR COPY CAMPAIGNS

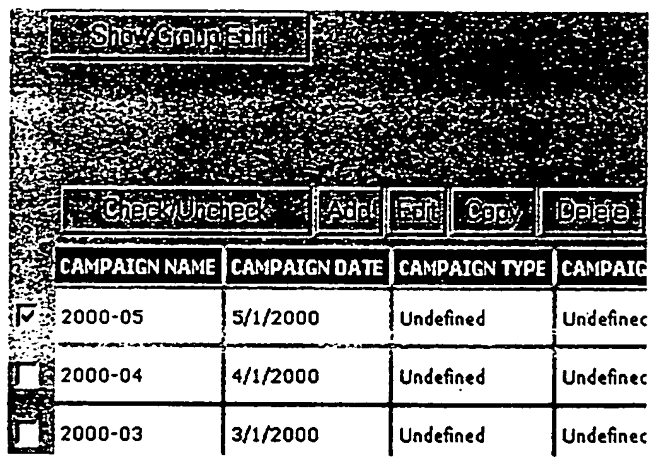



**1.** Select a **Source** (i.e. Inserts, etc.)




**2. Add** new **Campaign**(s) (Fig 3.10)

- Click Add
- Input **Campaign Name** (i.e. 2000-12) (**NOTE:** use year before month to better sort multiple campaigns)
- Input **Start Date** (i.e. 12/1/00)
- Input optional data: **Campaign Type, Status, Expense Set, Revenue Set, Budgeted Gross Pct, Budgeted Volume**
- **Submit** to enter and save your information

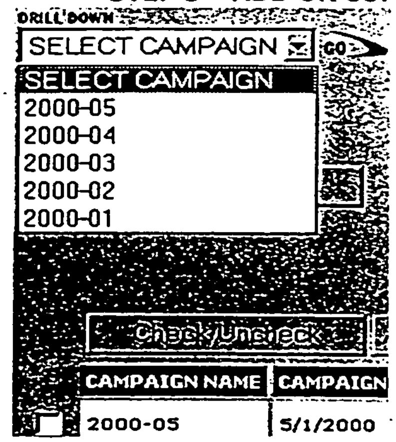



**3. Copy** feature:

- Select the campaigns to **Copy** (you can choose more than one at a time to copy) with ☑ at the left of the campaign name
- Select Copy button to duplicate campaign(s) and panel(s) associated with campaigns copied (your copies will appear at the top of the campaign table (i.e. Copy 1 of 2000-12). **Edit** the copied **campaign name** (i.e. 2001-12)(**NOTE:** Campaign names are unique to each source name).
- Edit Once you ☑ the record(s) you wish to edit, click the Edit button to go to the Edit screen and make changes.
- **Submit** to enter and save your information

| | |
|---|---|
| **TIPS:** | • **EDIT** button – edit records in the database<br>• **COPY** button - copy the campaigns & panels (not keys).<br>• **DELETE** button - delete a campaign (and its associated panels and keys) or panels and keys separately.<br>• **RETURN / BACK** to a previous screen/page use (Click on the underlined link and return)<br>PREVIOUS SELECTIONS > Business / The New Economy 1310 / DTP / Insert Cards |

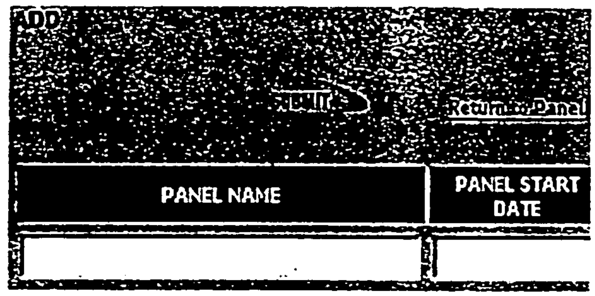
## STEP 3 – ADD OR COPY PANELS




**1.** Select a **Campaign** (i.e. 2000-01)

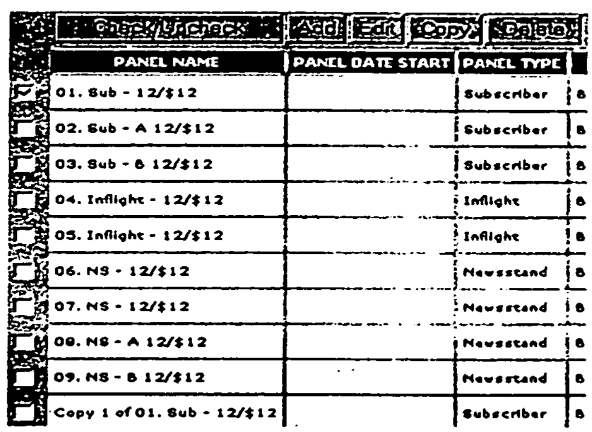
**2. Add** new **Panel(s)**

- Click Add
- Input **Panel** name (i.e. Control, Price test, etc.)
- Input Optional Data: **Panel Start Date, Panel Type, SubType, Test Type, Package, Expense Set, Revenue Set**
- **Submit** to enter and save your information

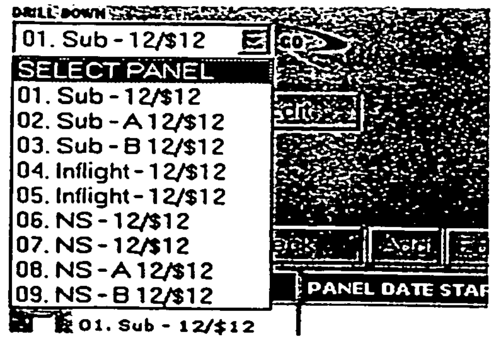



**3. Copy** feature:

- Select the panels to **Copy** (you can choose more than one at a time to copy) with ☑ at the left of the panel name
- Select Copy button to duplicate panel(s) (copies will appear at the bottom of the panel table (i.e. Copy 1 of 01. Sub). **Edit** the copied **panel name (NOTE:** Panel names are unique to each source name).
- Edit Once you ☑ the record(s) you wish to edit, click the Edit button to go to the Edit screen and make changes.
- **Submit** to enter and save your information

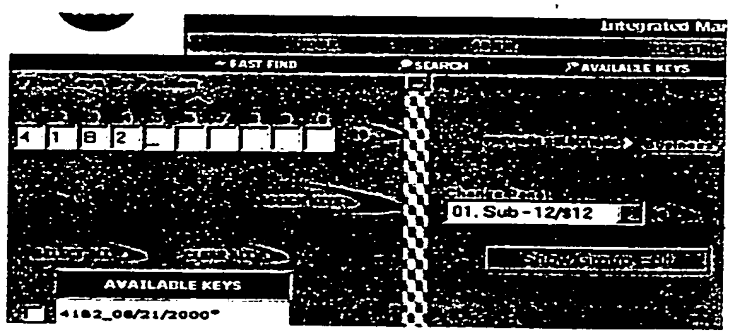



| | |
|---|---|
| **TIPS:** | • **EDIT** button – edit records in the database<br>• **COPY** button - copy the campaign & panels (not keys).<br>• **DELETE** button - delete a campaign and its associated panels and keys.<br>• **RETURN / BACK** to a previous screen/page use (Click on the underlined link and return)<br>  |



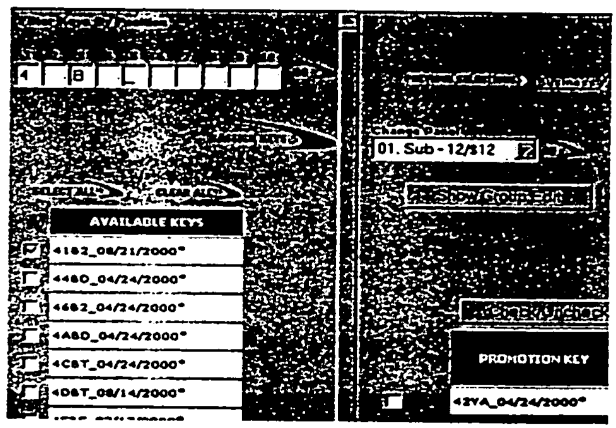

**1.** Select a **Panel** (i.e. 01.Sub – 12/$12)

**2. Assign** new **Key**(s) - Confirm the correct **Panel** in view to assign key(s)

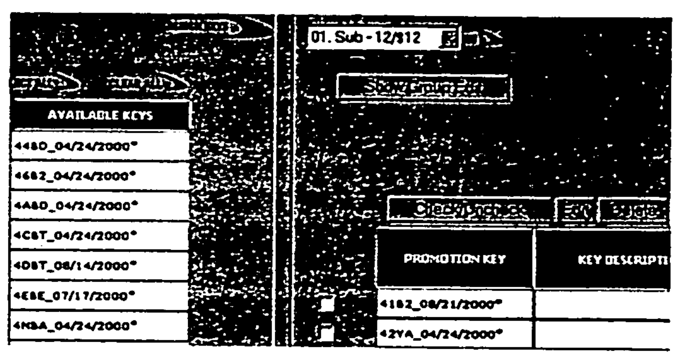



**3. Filter Keys By Position**

- Input one or more of the **10 key** position fields (i.e. 41B2_08/21/2000), use less fields to view more keys in the available keys table)
- Click **Go** to view the specific list of available keys within given range
- Select the **Keys** you are assigning to the **Panel**
- Select ☑ at the left of each individual key
- Click **Select All** to select all available keys in view
- Click **Clear All** to de-select all available keys in view
- Click **Assign Keys** when your selections are complete (your selected keys will now be assigned / viewed in the **Key Table** in the selected **Panel**)




**4.** When assigning Keys to more than one **Panel** within a campaign, select **Change Panel** and repeat steps above




| | |
|---|---|
| **NOTE:** | For more information on assigning **Insert Card** Keys and using the **Draw/Sale/Subtotal Flag** fields, go to **Page 29** |

The **Group Edit** and **Multi-Edit** features in Admin allow the user to more easily edit campaigns, panels, or keys. For example: Make a universal change on all panels, use the **Group Edit** feature. Or, if there are several independent fields to change on each panel, you could use the **Multi-Edit** feature.

**GROUP EDIT:**

**Step - 1** Click the Show Group Edit button. This will bring up the group edit bar with the same headings as the columns in the campaign, panel or keys tables. To close the Group Edit screen, click on Hide Group Edit.

**Step - 2** Check the ☑ next to the campaigns, panels, or keys you wish to edit. Or you can use Check/Uncheck - This button will select each row of data by placing a check mark (☑) in all the white boxes. Click it again and it will clear the selection. You can also use this button to toggle selected ☑/☐.

**Step - 3** In the Group Edit section at the top, make the change to the field(s) you wish to edit.

| Group Edit | | | | |
|---|---|---|---|---|
| IGN DATE | CAMPAIGN TYPE | CAMPAIGN STATUS | EXPENSE SET | REVENUE |
| e) | (No Change) | (No Change) | (No Change) | (No Change) |

**Step - 4** Once you've made the change, click Submit Changes. You will see that the edits you requested are now reflected below in the records you chose to edit.

**MULTI-EDIT:**

**Step - 1** Check the ☑ next to any row(s) you wish to edit. Or you can use the Check/Uncheck button described above.

**Step - 2** Select Edit

**Page 1 – Records 1-5 of 5**
Return to Menu

| Multi Edit | | | | |
|---|---|---|---|---|
| CAMPAIGN NAME | CAMPAIGN START DATE | CAMPAIGN TYPE | CAMPAIGN STATUS | EX |
| 2000-05 | 5/1/2000 | 2000 Fall | Active | Undefined |
| 2000-04 | 4/1/2000 | 2000 Fall | Active | Undefined |
| 2000-03 | 3/1/2000 | 2000 Fall | Active | Undefined |
| 2000-02 | 2/1/2000 | 2000 Fall | Active | Undefined |
| 2000-01 | 1/1/2000 | 2000 Fall | Active | Undefined |

Submit Changes

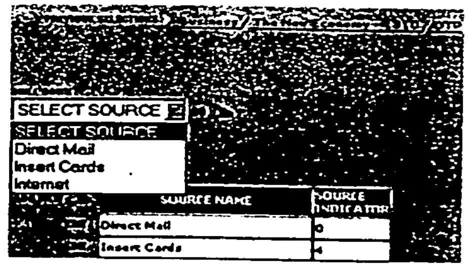
| | |
|---|---|
| **NOTE:** | The system allows you to select and edit up to 20 records at a time, however the actual **Edit** screen will only show five of your selections at one time. Make the necessary changes, click **Submit Changes** button, and this will save changes and take you to the next screen to edit remaining selections. When all selections have been edited, the system will automatically take you back to the initial screen. |

## STEP 1 – EDIT CAMPAIGNS

**1.** Select a **Source** (i.e. Inserts)

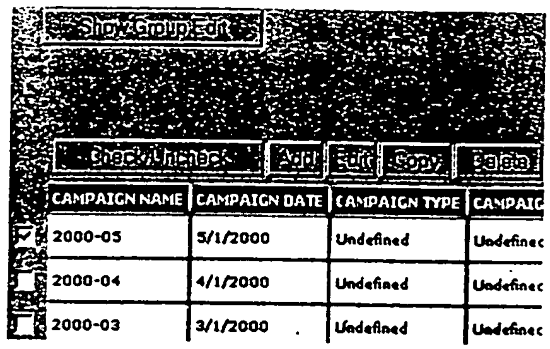
**2. Edit** one **Campaign**

- Select ☑ existing campaign to edit, click Edit
- **Edit Campaign Name** (i.e. 2000-01) (**NOTE:** use year before month to better sort multiple campaigns)
- **Edit Start Date** (i.e. 12/1/00)
- **Edit** optional data: **Campaign Type, Status, Expense Set, Revenue Set, Budgeted Gross Pct, Budgeted Volume**
- **Submit** to enter and save your information

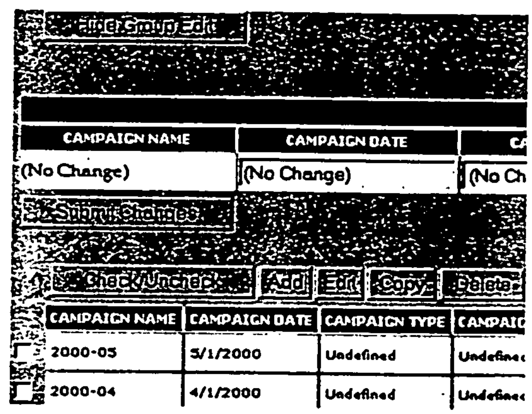



**3. Group Edit** or **Multi-Edit** existing **Campaign**

**Option A:** Click Show Group Edit



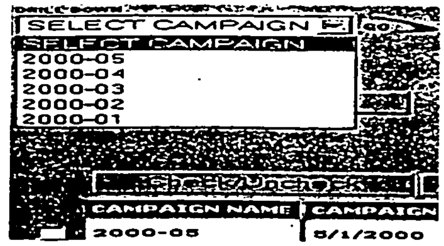

- Click Check/Uncheck button to auto select/un-select (☑) campaigns to edit
  **or**
- Select/unselect individually by clicking ☑ at left of campaign name, confirm the campaigns to edit (as a group) with ☑ at the left of the campaign name. Make your edit(s) in the open fields (Group Edit Bar above the Campaign Table). Submit Changes to enter and save your information.




**Option B: Multi-Edit** feature:

- Select the campaigns to edit with ☑ at the left of the campaign name
- Click **Edit** button above campaign table to view campaign(s) to edit
- Make your edit(s) in the open fields associated with the campaign(s) to edit (**NOTE:** only 5 Campaigns are in view at one time, while using **Multi-Edit**)
- Click **Submit Changes** button to save changes and take you to the next screen to edit remaining selections. When all selections have been edited, the system will automatically take you back to the initial screen.

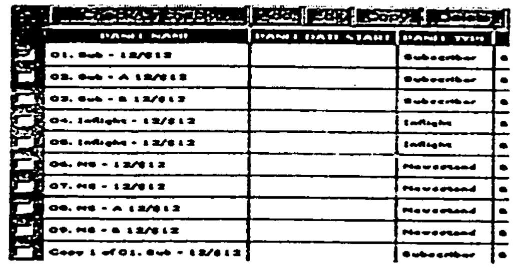
| | |
|---|---|
| **TIPS:** | • **EDIT** button – edit records in the database<br>• **COPY** button - copy the campaign & panels (not keys).<br>• **DELETE** button - delete a campaign and its associated panels and keys.<br>• **RETURN / BACK** to a previous screen/page use (Click on the underlined link and return)<br>PREVIOUS SELECTIONS: Business / The New Economy / 1310 / DTP / Insert Cards |




1. Select a **Campaign** (i.e. 2000-12)

2. **Edit Panel**

   - Select ☑ existing **Panel** to edit, click **Edit**
   - **Edit Panel** name (i.e. Control, Price test, etc.)
   - **Edit** Optional Data: **Panel Start Date, Panel Type, SubType, Test Type, Package, Expense Set, and Revenue Set**
   - **Submit** to enter and save your information



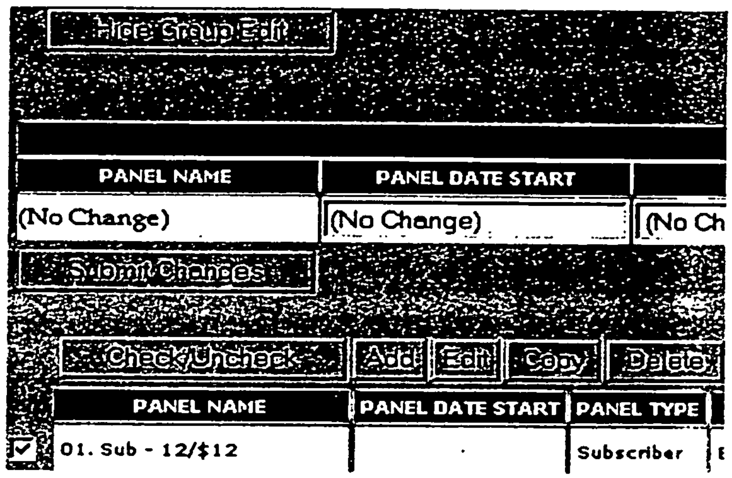
3. **Group Edit or Multi-Edit** existing **Panel**

   **Option A: Group Edit** feature:

   - Click **Show Group Edit** button below **Select Panel** field
   - Select **Check/Uncheck** button to auto select/un-select (☑) panels to edit

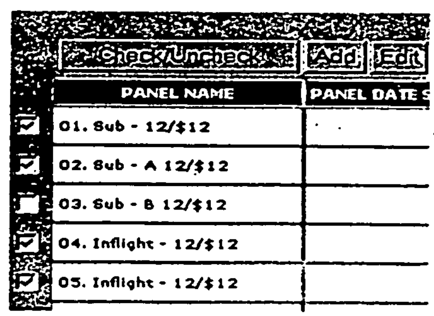
   **or**

   - Select/unselect individually by clicking ☑ at left of panel name
   - Confirm the panels to edit (as a group) with ☑ at the left of the panel name
   - Make your edit(s) in the open fields (Group Edit Bar above the Panel Table)
   - **Submit Changes** to enter and save your information



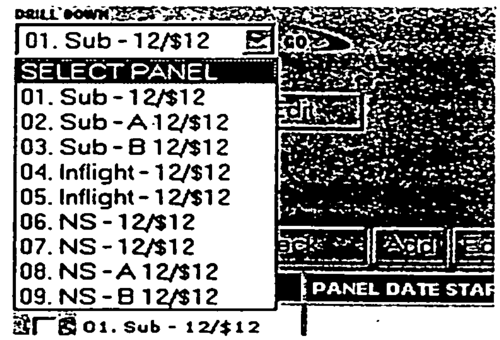

   **Option B: Multi-Edit** feature:

   - Select the panels to edit with ☑ at the left of the panel name
   - Click **Edit** button above panel table to view panel(s) to edit
   - Make your edit(s) in the open fields associated with the panel(s) to edit (**NOTE:** only 5 Panels are in view at one time, while using **Multi-Edit)**
   - Click **Submit Changes** button to save changes and take you to the next screen to edit remaining selections. When all selections have been edited, the system will automatically take you back to the initial screen.




| | |
|---|---|
| **TIPS:** | • **EDIT** button – edit records in the database<br>• **COPY** button - copy the campaign & panels (not keys).<br>• **DELETE** button - delete a campaign and its associated panels and keys.<br>• **RETURN / BACK** to a previous screen/page use (Click on the underlined link and return)<br>PREVIOUS SELECTIONS: Business / The New Economy / E810 / DTP / Insert Cards / 2000-01 |

**1.** Select a **Panel** (i.e. control)

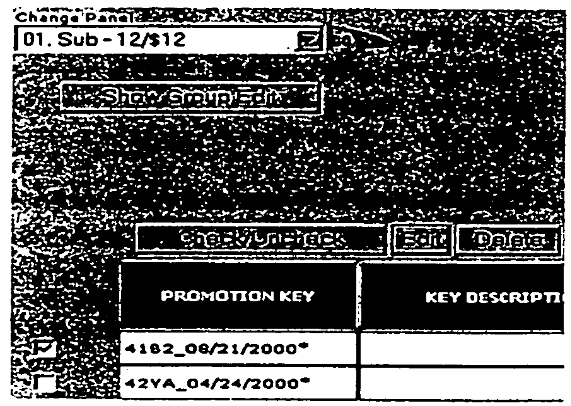



**2. Edit one Key**

- Select ☑ existing **Key** to edit, click Edit
- **Edit Key** name (i.e. Control, Price test, etc.)
- **Edit** Optional Data: **Panel Start Date, Panel Type, SubType, Test Type, Package, Expense Set, and Revenue Set**
- **Submit** to enter and save your information

**3. Group Edit** or **Multi-Edit** assigned Key

**Option – A: Group Edit feature**

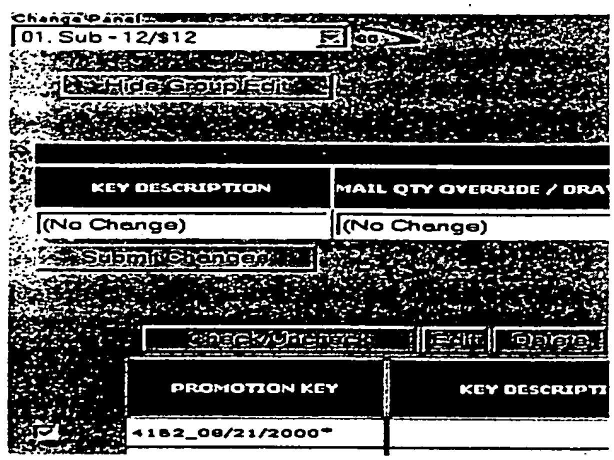



- Click Show Group Edit button below the Change Panel/Selected Panel field
- Select Check/Uncheck button to auto select/un-select (☑) Keys to edit

or

- Select/unselect individually by clicking ☑ at left of key name/code
- Confirm the keys to edit (as a group) with ☑ at the left of the key name
- Make your edit(s) in the open fields (Group Edit Bar above the Key Table)
- Submit Changes to enter and save your information

**Option – B: Multi-Edit** feature:




- Select the keys to edit (as a group or individually) with ☑ at the left of the key name
- Click **Edit** button above key table to view key(s) to edit
- Make your edit(s) in the open fields associated with the key(s) to edit **(NOTE:** only 5 Panels are in view at one time, while performing **Multi-Edit)**
- Click **Submit Changes** button to save changes and take you to the next screen to edit remaining selections. When all selections have been edited, the system will automatically take you back to the initial screen.

| | |
|---|---|
| **TIPS:** | • **EDIT** button – edit records in the database<br>• **COPY** button - copy the campaign & panels (not keys).<br>• **DELETE** button - delete a campaign and its associated panels and keys.<br>• RETURN / BACK to a previous screen/page use (Click on the underlined link and return)<br>PREVIOUS SELECTIONS : Business / The New Economy - 1310 / DTP / Insert Cards / 2000-01 / 01. Sub - 12/$12 |

## OVERVIEW

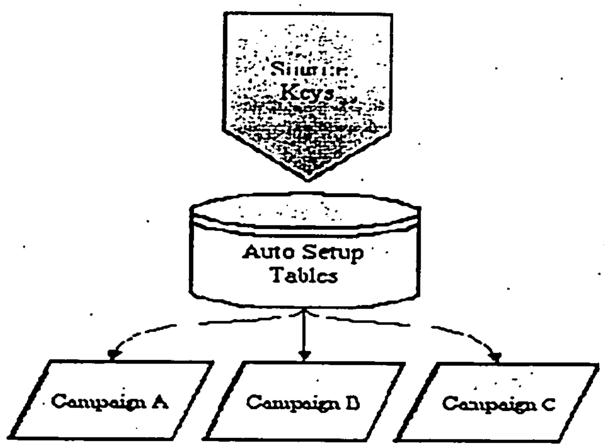
**IMT AutoAdmin** has been created to minimize the amount of time spent on setting up campaigns in IMT Reporting. The idea behind AutoAdmin is that certain keys have a solid structure and therefore can be assigned based on the design of the key. Bills and Renewals are good examples of sources with a solid key structure. Fulfillment houses generally maintain uniformity across these two sources.

IMT is able to look to the appropriate position in each key to pull relevant information from the key, and then designate an appropriate source, campaign and panel. AutoAdmin within IMT Reporting refers to the process whereby source keys are automatically assigned to Sources, Campaigns and Panels without manual administration (see Building Campaigns section). This is accomplished through a series of user-defined setup tables that serve as instructions for interpreting source keys. These tables serve as filters that provide the system with basic instruction.

**Does AutoAdmin replace manual administration?**
No, AutoAdmin Setup is an enhancement to IMT Reporting. If you prefer to setup your campaigns manually, then you can continue to do so. In fact there are some sources where manually administration is preferable or required. NOTE: Bills & Renewals generally have the same panel name (i.e. control) across multiple campaigns.

**Does Auto Setup work for any source?**
Yes, AutoAdmin can be used for any source of business. However, in order for AutoAdmin to work most effectively a clearly defined source key logic must exist. As a minimum requirement, specific positions from a source key must distinguish the source and campaign. Billing and Renewals source, which often account for the highest number of source keys, typically utilize a standardized key logic that is well suited to AutoAdmin. For other sources of business that are not as standardized, manual administration of campaigns may be preferable or required.

**How do I get started?** (Where is it located?)
To get started, you will need to learn more about how the AutoAdmin Setup tables work and how to populate these tables correctly. To access **AutoAdmin** click on the **Setup Tables** (located on the IMT Tool Bar), then select **AutoAdmin** from the drop down menu.




| | |
|---|---|
| **NOTE:** | Once these tables have been populated, the system will automatically assign keys to the correct source, campaign and panel as they come on the file. It is important, however, to check that keys are assigned correctly in order to ensure accuracy in reporting. There are checking reports available, which will aid in this process. For Bills, use the "Billing Source Key Assignment – Checking Report"; for Renewals, use the "Renewals Source Key Assignment – Checking Report". |

## HOW TABLES WORK

There are four Auto Setup tables, which together control how source keys are associated to sources, campaigns and panels.

| TABLE | PURPOSE | REQUIRED? |
|---|---|---|
| **Auto Setup Schemes** | The Auto Setup Schemes table allows a user to create filters through which source keys are passed. The primary component of a scheme is called the ***setup mask***. A setup mask identifies which position(s) of a source key represent the source, campaign, panel or prior source. | YES |
| **Campaign Name Definitions** | This Campaign Name Definition table provides a user the opportunity to convert campaign codes to names that are more descriptive. Campaign codes are based upon the source key positions that represent the campaign. | NO |
| **Renewal Prior Source Definitions** | This table is only used for renewal sources, and only in cases when a source is split. For example, if all conversions source keys begin with a source indicator "6", you may wish to split out DTP and agent conversions separately based upon prior source. | NO |
| **Panel Name Definitions** | This table is only used in conjunction with setup schemes that identify panel splits. If a panel split is identified in a setup scheme, then panel codes can be given more descriptive names by adding records to this table, and then applying the panel-naming scheme to a campaign in the campaign names definitions table. | NO |

| | |
|---|---|
| **NOTE:** | Not all the Auto Setup tables need to be populated for the system to automatically assign keys to sources and campaigns. In fact, only the Auto Setup Schemes table is required for Auto Setup to work; the other tables provide a means of controlling more precisely how campaigns and panels are named, or in the case of renewals provide the ability to split a source. |

### AutoSetup Schemes

| ADD NEW | Source | Source Indicator | Select Date From | Select Date To | Setup Mask | Expense Set |
|---|---|---|---|---|---|---|
| EDIT | Billing | B | 1/1/1998 | 12/31/2005 | SCCxCCxxxxxxxxP | Undefined |

### Campaign Name Definitions

| ADD NEW | Source Category | Campaign Code | Campaign Description | Campaign Date | Panel Scheme |
|---|---|---|---|---|---|
| EDIT | Billing | AX00 | 00 Credit Period AX00 | 8/1/2000 | |

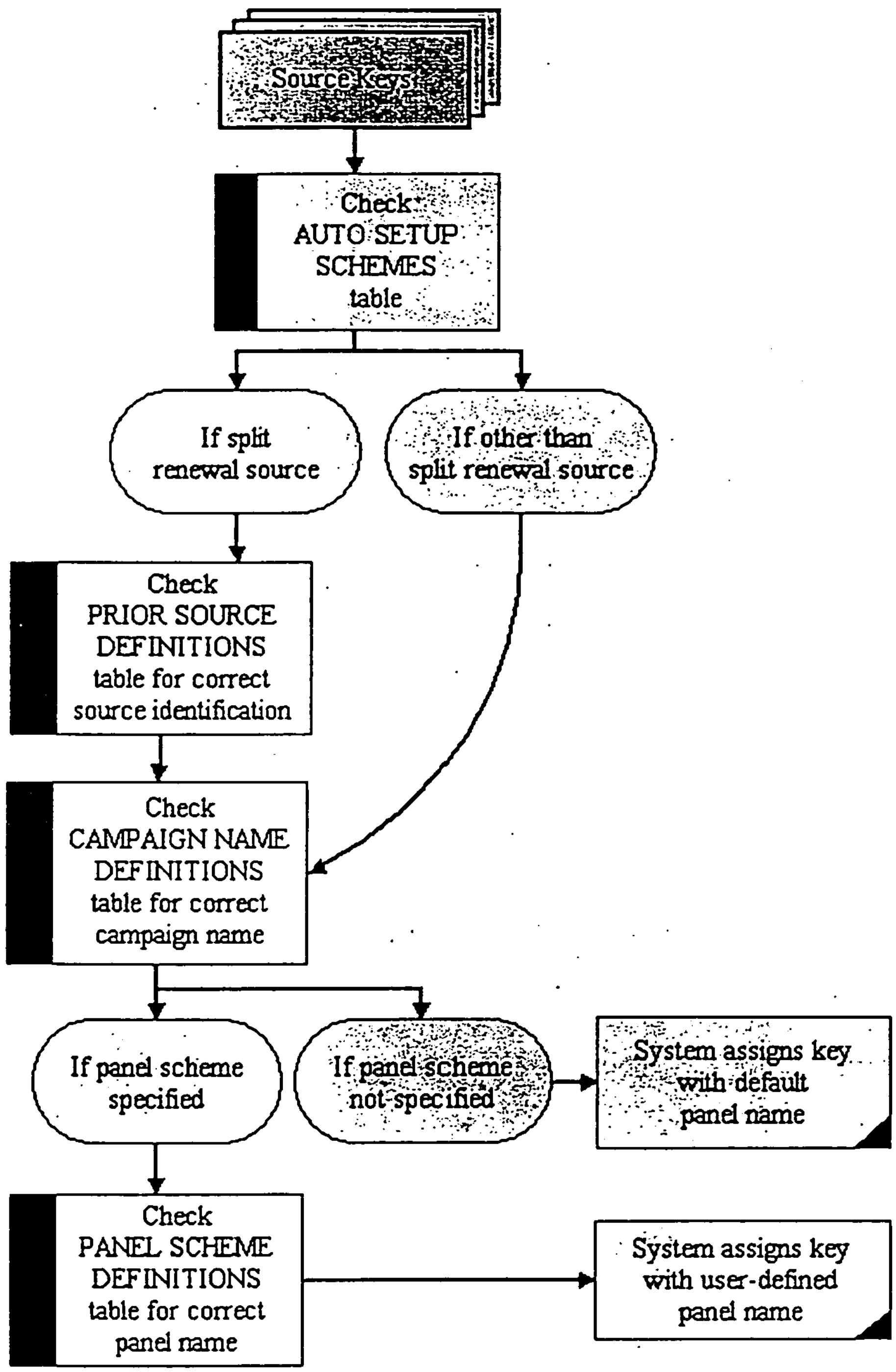
### Renewal Prior Source Definitions

| ADD NEW | Source | Source Indicator | Prior Source Indicator | Valid From | Valid To |
|---|---|---|---|---|---|
| EDIT | Agent Conversions | 6 | A,B,C,D,E,F,G,H,J,K,L,M,N,P | 1/1/1999 | 12/31/2005 |

### Panel Name Definitions

| ADD NEW | Panel Scheme | Panel Codes | Panel Name |
|---|---|---|---|
| EDIT | Ack Retest | P,Z,U,D,G,J,S,T,Q,C,B,Z,1,2,3,9,* | Control |

The schematic below shows the sequence of checks that Auto Setup makes in order to correctly associate source keys to sources, campaigns and panels.



IMT Reporting will divide source keys into four broad categories (Source Category):

- DTP (direct to publisher)
- Renewal
- Gift
- Billing

Depending on the fulfillment company, the source category, and IMT's summary procedures, source keys may have different formats. Below is a chart to help identify and interpret source keys based on fulfillment company.

| EDS / CENTROBE | | |
|---|---|---|
| **TYPE** | **EXAMPLE** | **DESCRIPTION** |
| **DTP** | 0SUA_20000124 | Position 1 = Source<br>Positions 2-4 = Open<br>Positions 6-13 = Date (yyyymmdd)<br><br>NOTE: An asterisk (*) appended to a key indicates that the key was received without a select date specified. As a result, IMT appends the process date to the key for id purposes. |
| **RENEWAL** | 7AK1_6_526 | Position 1 = Source<br>Position 2 = Issue or Package<br>Position 3 = Issue or Package<br>Position 4 = Effort<br>Position 6 = Prior Source<br>Position 7-9 = Expire |
| **GIFT** | 2CL5_G_20001215 | Position 1 = Source<br>Position 2-4 = Open<br>Position 6 = Gift Identifier<br>Position 8-15 = Date (yyyymmdd)<br><br>NOTE: An asterisk (*) appended to a key indicates that the key was received without a select date specified. As a result, IMT appends the process date to the key for id purposes. |
| **BILLING** | B52_990321_4_1A | Position 1 = Source<br>Position 2-3 = Bill key<br>Position 5-10 = Date (yymmdd)<br>Position 12 = Current Source<br>Position 14 = Effort<br>Position 15 = Package |

## SOURCE KEY ANATOMY - CONTINUED

**PALM COAST DATA**

| TYPE | EXAMPLE | DESCRIPTION |
|---|---|---|
| DTP | 28M25A_1999 | Position 1 = Source<br>Position 2-6 = Open<br>Position 8-11 = Date (yyyy) |
| RENEWAL | 3E9H01_1999 | Position 1 = Source<br>Position 2 = Prior Source<br>Position 3-4 = Issue<br>Position 5 = Package<br>Position 6 = Effort |
| GIFT | D9NC11_1999 | Position 1 = Source<br>Position 2-6 = Open<br>Position 8-11 = Date (yyyy) |
| BILLING | B2_930_00 | Position 1 = Source<br>Position 2 = Prior Source<br>Position 4 = Year (y)<br>Position 5-6 = Credit Period<br>Position 8-9 = Effort |

**CDS**

| TYPE | EXAMPLE | DESCRIPTION |
|---|---|---|
| DTP | DP2F001_010199 | Position 1 = Source<br>Position 2-4 = Open<br>Position 5-7 = Split<br>Position 9-14 = Date (mmddyy) |
| RENEWAL | RU21000_010199 | Position 1 = Source<br>Position 2 = Issue<br>Position 3 = Prior Source<br>Position 4 = Effort<br>Position 5-7 = Split<br>Position 9-14 = Date (mmddyy) |
| GIFT | YTA1000_010199 | Position 1 = Source<br>Position 2-4 = Open<br>Position 5-7 = Split<br>Position 9-14 = Date (mmddyy) |
| BILLING | BP21000_010199 | Position 1 = Source<br>Position 2 = Credit Period<br>Position 3 = Current Source<br>Position 4 = Effort<br>Position 5-7 = Split<br>Position 9-14 = Date (mmddyy) |

**AutoAdmin Setup Schemes** table tells the system what sources to look for to automatically setup campaigns. You define the criteria to identify and assign source keys to a campaign. The system will work even if this is the only table you setup. (However, to do proper naming of campaigns and splitting of panels, you should use all the tables. For example, if you only filled out this table, then your campaigns and panels would be named based on the fulfillment codes: Campaign = Expire 521, Panel = Panel A. If you filled out the Campaign Name Definition table and Panel Schemes table, then you could have the system name them: Campaign = 2000-01, Panel = Control).

The **Setup Mask** is the most important element of any Setup Scheme. The Setup Mask is simply a string of alpha characters used to identify the parts of a source key. IMT has created a simple set of characters to identify source, campaign, panel/split, and prior source (renewals only). By stringing these characters together to form a Setup Mask, you provide our system with all the information required to automatically identify and create campaigns.

**Setup Mask Legend**

| Identifier | Description | Examples |
|---|---|---|
| **S** | Source | B = Billing<br>1 = Renewals |
| **C** | Campaign, Expire or Credit Period | 125 = Expire 125 (Jan-2000)<br>001 = Jan 2000 Expire |
| **P** | Package/Split | 0 = Renewal Control<br>1 = Renewal Test |
| **Z** | Prior Source | 0 = Direct Mail<br>6 = Conversions<br>A = AFP |
| **x** | Placeholder | Used to mark a position on a source key that does NOT identify Source, Campaign, Panel/Split, or Prior/Current Source |

| | |
|---|---|
| **NOTE:** | Understanding how your source keys are constructed is a pre-requisite to creating Auto Setup Schemes. Since IMT will often enhance source keys (in order to provide better reporting capabilities), you should familiarize yourself with IMT's source key structure. |

AutoSetup Schemes

| ADD NEW | Source | Source Indicator | Select Date From | Select Date To | Setup Mask | Expense Set |
|---|---|---|---|---|---|---|
| EDIT | Billing | B | 1/1/1998 | 12/31/2005 | SCCxCCxxxxxxxxP | Undefined |
| EDIT | Billing | B | 1/1/1998 | 12/31/2005 | SCCxCCxxxxxxxxxP | Undefined |
| EDIT | Renewals 1x | 1 | 1/1/1998 | 12/31/2005 | SxPxxZxCCC | Undefined |
| EDIT | Renewals 2+ | 1 | 1/1/1998 | 12/31/2005 | SxPxxZxCCC | Undefined |
| EDIT | Agent Conversions | 6 | 1/1/1998 | 12/31/2005 | SxPxxZxCCC | Undefined |
| EDIT | DTP Conversions | 6 | 1/1/1998 | 12/31/2005 | SxPxxZxCCC | Undefined |
| EDIT | DTP Conversions | 6 | 1/1/1998 | 12/31/2005 | SxPxxZZxCCC | Undefined |

## CREATE NEW SOURCE

1. Select **ADD NEW** source.
2. Select a **Source Name** from drop down menu.
3. Input **Source Indicator** (first position of source key, i.e. 1=Renewals or E=Agent Conv)
4. Type in **Valid From** and **Valid To** dates (should select a date far in future, this field may be used when you change first position of source, i.e. if you change fulfillment houses). **AutoAdmin** looks at the select date on a key to determine if it fits the range.
5. **Create Setup Mask** - The Setup Mask identifies what part of the source key Admin will look at to create a campaign. Each fulfillment house has a different source key structure and therefore a different Setup Mask. To create a Setup Mask, choose from one of the following schemes below.

| | |
|---|---|
| **NOTE:** | If you do not include a specific position for "P", panel, then and the system will automatically default each key into a panel called "Control". Otherwise it will create a panel based on the panel scheme defined in the Panel Name Definition table, or create a panel based on the fulfillment code in the key, i.e. Panel A, Panel 1, etc. |

**SAMPLE SETUP MASKS**

Since the **Setup Mask** is the most important component of a setup scheme, for reference here are some examples of setup masks by Fulfillment Company and source:

| EDS/Centrobe | |
|---|---|
| Source | Setup Mask |
| **Renewal (SIPE)** | SxPxxZxCCC |
| **Renewal (SPIE)** | SPxxxZxCCC |
| **Renewal (SIPE) - Double Digit** | SxPxxZZxCCC |
| **Renewal (SPIE) - Double Digit** | SPxxxZZxCCC |
| **Billing** | SCCxCCxxxxxZxxP |
| **Billing – Double Digit** | SCCxCCxxxxxZZxxP |
| **DTP** | Depends on key structure |
| **Gift** | Depends on key structure |

| Palm Coast Data | |
|---|---|
| Source | Setup Mask |
| **Renewal** | SZCCPxxCCCC |
| **Billing** | SZxCCCxPx |
| **DTP** | Depends on key structure |
| **Gift** | Depends on key structure |

| CDS | |
|---|---|
| Source | Setup Mask |
| **Renewal** | SCZxPPPxxxxxCC (CC relates to effort select date not necessarily expire year) |
| **Billing** | SCZxPPPxxxxxCC |
| **DTP** | Depends on key structure |
| **Gift** | Depends on key structure |

# CAMPAIGN NAME DEFINITION

**Campaign Name Definitions** table allows you to define your campaigns based on the fulfillment codes and give them user-defined names. Naming your campaigns makes it easier to keep track of them and easier to do analysis. You can also define certain panel schemes for each campaign. **Example:** let's say you have an expire campaign with which you conducted a test, then you may want to create a panel scheme that will split the expire (two panels) – control and test. This table provides the ability to choose a panel scheme that automatically creates control and test panels.

| | |
|---|---|
| NOTE: | If you already have prior campaigns setup in admin and want future source keys to be assigned to those campaigns, you still need to create a Campaign Name in this table. That campaign name must match the campaign and panel names exactly as they are already named in Admin for new keys to be correctly assigned to it. Otherwise, it will create a new campaign. If this happens, a quick fix is to delete the old or new campaign that was created, and reassign it correctly in the Campaign Name Definition table so that the keys can be reassigned. Deleting a campaign places those source keys back in the available keys table to be reassigned. |

**Create Campaign Names:**

1. Select **ADD NEW** to create the campaigns for Bills and Renewals that you want the system to automatically add to Admin.
2. Type in a **Campaign Code** based on your "C" scheme in the setup mask (i.e. Centrobe Renewal CCC= 520, or Palm Coast CCCCCC = 1A2001).
3. Type in a **Campaign Description** name to identify your campaigns (i.e. "2000-01" for Renewal expires, or "99 BK 48" for Billing credit period).
4. Select a **Source Category** from the drop down menu.
5. Type in a **Campaign Date** (i.e. 1/1/2000 for a Jan expire) to assign.
6. Select a **Panel Scheme** from the drop down menu (based on what is defined in the Panel Name Definition table).
7. **Submit** to save

**Campaign Name Definitions**

| ADD NEW | Source Category | Campaign Code | Campaign Description | Campaign Date | Panel Scheme |
|---|---|---|---|---|---|
| EDIT | Billing | AX00 | 00 Credit Period AX00 | 8/1/2000 | |
| EDIT | Billing | VI00 | 00 Credit Period VI00 | | |
| EDIT | Billing | 0198 | 1998 BK 01 | 1/1/1998 | Bill Default |
| EDIT | Billing | 0298 | 1998 BK 02 | 1/1/1998 | Bill Default |
| EDIT | Billing | 0398 | 1998 BK 03 | 1/1/1998 | Bill Default |
| EDIT | Billing | 0498 | 1998 BK 04 | 1/1/1998 | Bill Default |
| EDIT | Billing | 0598 | 1998 BK 05 | 2/1/1998 | Bill Default |

**Panel Name Definitions** table is used to create your panel naming schemes. You can choose to identify all your panels as controls, or you can create a scheme for individual campaigns that may have tests going on and name them appropriately (i.e. control, price test, creative test, etc). The schemes you setup can then be applied to the **Campaign Name Definition** table.

| | |
|---|---|
| **NOTE:** | If you already have prior campaigns setup in admin and want future source keys to be assigned to those campaigns, you still need to create a Campaign Name in this table. That campaign name must match the campaign and panel names exactly as they are already named in Admin for new keys to be correctly assigned to it. Otherwise, it will create a new campaign. If this happens, a quick fix is to delete the old or new campaign that was created, and reassign it correctly in the Campaign Name Definition table so that the keys can be reassigned. Deleting a campaign places those source keys back in the available keys table to be reassigned. |

**Create Panel Name Definitions:**

1. Select **ADD NEW** to create a new panel scheme to define how campaign panels should be named and possibly split.
2. Type in a **Panel Scheme** name to define panel definition (i.e. Renewal Default, Jan 00 Test, Billing DM Test, etc).
3. Type in the **Package Code**(s) from the **Source Key** (P) that apply to the scheme (you can list more than one package at a time, just separate with a comma).
4. Type in the **Panel Name** you want to describe the panel for reporting (i.e. Control, Test 1, Price Test, Creative Test, etc.)
5. **Submit** to save

## Panel Name Definitions

| ADD NEW | Panel Scheme | Panel Codes | Panel Name |
|---|---|---|---|
| EDIT | Ack Retest | P,Z,U,D,G,J,S,T,Q,C,B,Z,1,2,3,9,* | Control |
| EDIT | Ack Retest | A | Control Panel |
| EDIT | Ack Retest | B | Test - Ack Retest |
| EDIT | Bill Default | A,B,C,D,E,F,G,H,J,K,L,M,N,P,Q,R,S,T,U,V,W,X,Y,Z | Control |
| EDIT | Bill Default | 0,1,2,3,4,5,6,7,8,9,* | Control |
| EDIT | Creative Test | P,M,U,G,J,S,T,Q,B,C,Z,1,2,3,9,* | Control |
| EDIT | Creative Test | A,D | Control Panel |
| EDIT | Creative Test | B,E | Test - 1st Eff Ack Creative |
| EDIT | Email Test | P,M,A,D,G,J,S,T,Q,B,C,Z,1,2,3,9* | Control |
| EDIT | Email Test | K | Control Panel |
| EDIT | Email Test | 4 | Test - Email |
| EDIT | Ren Default | A,B,D,E,G,J,K,Q,R,T,X | Control |

**Using the Prior Source Definition Table**

In the case of some renewal sources, a user may wish to split keys into groups based on prior source. This can be accomplished by using the **Prior Source Definition** table. Common example might be taking a single conversion source and splitting it into two unique sources - DTP Conversions and Agent Conversions. The Prior Source Definition table provides a user the option of identifying which prior source codes are DTP versus Agent. If you have **Z** marked in your Setup Mask, then it will look to this table for more information on how to assign a key to the correct split source.

| | |
|---|---|
| **NOTE:** | If prior source is identified in the source scheme setup mask ("Z"), but there are no corresponding records in the Prior Source Definition table, then the system will NOT be able to auto assign keys. Conversely, if there are records in the Prior Source Definition table, but prior source has not been identified in a source scheme setup mask ("Z"), then the system will NOT be able to properly assign keys. |

**Create Prior Source Definitions:**

1. Select **ADD NEW** to create a **Prior Source Definition** table.
2. Select a **Source Name** from the drop down menu.
3. Input **Source Indicator** (1st position of source key, i.e. 1=Renewals or E=Agent Conv)
4. Input **Prior Source Indicator** (you can list more than one source at a time, just separate with a comma).
5. Input a **Valid From** and **Valid To** date that these prior source definitions are valid.
6. **Submit** to save

Renewal Prior Source Definitions

| ADD NEW | Source | Source Indicator | Prior Source Indicator | Valid From | Valid To |
|---|---|---|---|---|---|
| EDIT | Agent Conversions | 6 | A,B,C,D,E,F,G,H,J,K,L,M,N,P | 1/1/1999 | 12/31/2005 |
| EDIT | DTP Conversions | 6 | 0,1,2,3,4,5,5G,M,6,7,8,9,Q,R,S | 1/1/1999 | 12/31/2005 |
| EDIT | Renewals 1x | 1 | 6 | 1/1/1999 | 12/31/2005 |
| EDIT | Renewals 2+ | 1 | 1 | 1/1/1999 | 12/31/2005 |

Reporting on **N/S** (Newsstand Sale) Insert cards can be based on either **N/S Sales** or **N/S Draw**. IMT allows the user this flexibility through the **Mail Qty Override/Draw, Newsstand Sale**, and Response based on Sale **(Y)** or Draw **(N)** fields. These three fields, and two others, can all be found at the Key Levels and are described below:

**At the Key level, you will have the following fields to use:**

**Mail Qty** – This is the quantity that comes through from the fulfillment house and is a non-editable field. Take note; with Insert Cards, the fulfillment houses may not always key in this information on file. When the data that comes through this field is missing or in some cases not accurate, you will need to use the **Mail Qty Override/Draw** field.

**Mail Qty Override/Draw** – This is the field you will use to enter a **subscriber distribution** quantity or a **newsstand draw** quantity. Named **Mail Qty Override/Draw** because if you enter a number here, that number will override any number that comes through the fulfillment house in the **Mail Qty** field and the **expense set** will look to **calculate print costs** off this number. If there is no number input here, it will then look to the **Mail Qty** field to calculate expense.

**Newsstand Sale** – This is where you would enter a **quantity for sell-through** if you want to calculate your gross and net responses off this number, otherwise you can leave it blank.

**Response Based on Sale (Y), Draw (N)** – Enter a **Y** if you want the reports to use the **N/S Sale Qty** for response analysis, enter an **N** if you want the report to use the **Mail Qty Override Draw Qty** for response analysis. The **default** is set to **N**.

**Subtotal Flag** – This field is for reporting purposes. Generally, when you run a DTP report, you want to count all the mail quantities for each key in the total for that campaign (i.e. Direct Mail). However, with Insert Cards, the newsstand and subscription quantities for each card promoted should only be counted once in the campaign total, not once for each card. Enter and **F** or False if you do not want that key's mail quantity to be included in the subtotal. Enter a **T** or True if you do want that key's mail quantity to be included in the subtotal. The **default** is set to **T**.

## HOW TO START

Before running reports, you must organize your data using IMT's Admin application. When Admin is complete, you're ready to view reports. Here are the steps to either create a new report, or run a saved report:

**STEP 1** – LOGON TO THE SYSTEM
1. Go to http://www.imtnetwork.com/
2. Click "**Client Center**"
3. Login with your username and password
4. Click **Reporting**

**STEP 2** – CHOOSE NEW OR SAVED REPORT

### Create a "NEW" report, follow these steps:

**STEP 3** – SELECT A PRODUCT (S)
- Select One or More **Products**

**STEP 4** – SELECT A REPORT
- Choose a REPORT CATEGORY
- Choose a REPORT STYLE

**STEP 5** – NAME YOUR REPORT
- Naming your report is optional

**NOTE:** Name your report in order to **save** it (other than Undefined).

Tip: At this point you can run your report. However, if you want to filter your report data, then you will need to make a data selection.

**STEP 6** – MAKE YOUR DATA SELECTION
Selection options include:
- Sources
- Campaign Type
- Campaign
- Panel Type
- Panel Test Type
- Panel Name

**STEP 6** – RUN YOUR REPORT

- To run your report click the RUN REPORT button

**STEP 7** – SAVE YOUR REPORT (optional)

- Go back to the report screen
- Click on the SAVE button
- Choose a **Report Group** (that has already been created) or **Create a New Report Group**
- Select a **Division / Group**
- **Go** and your report is now saved and stored by Division, Group and Report Group

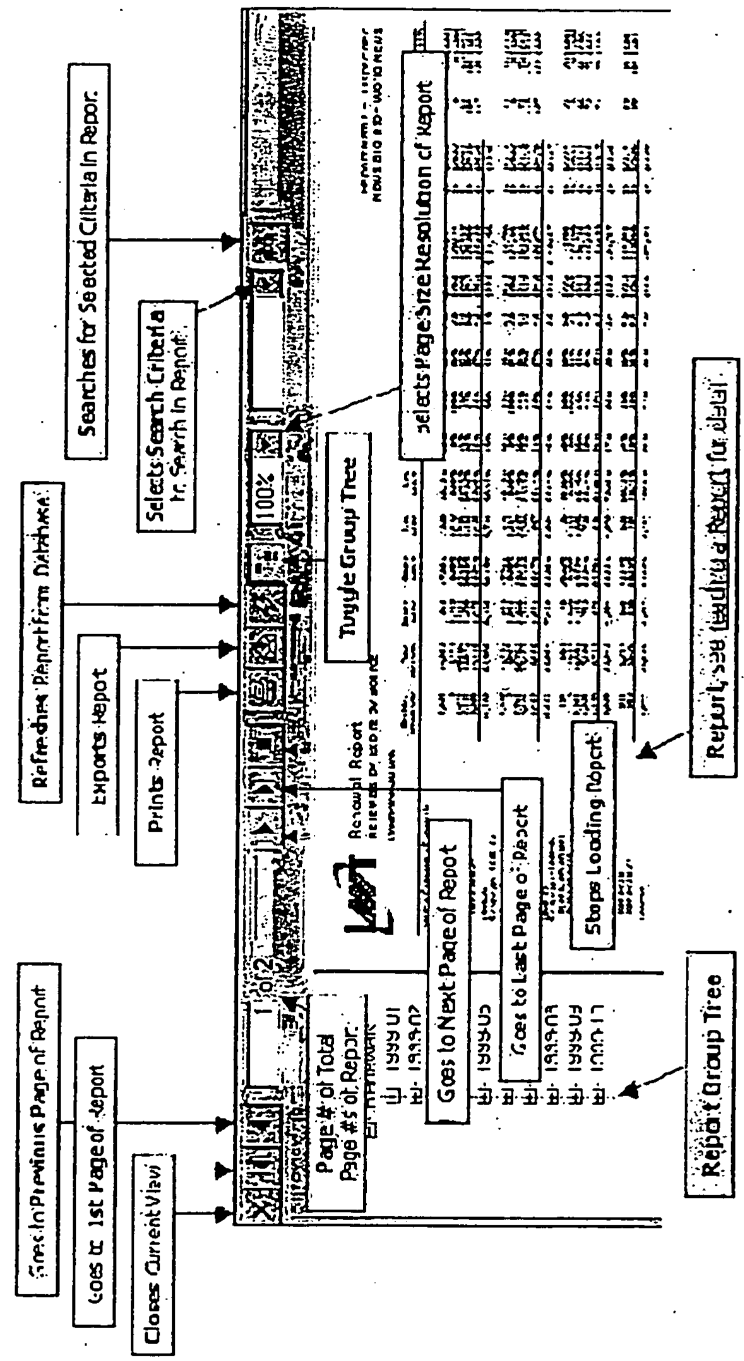
### Run a "SAVED" report, follow these steps:

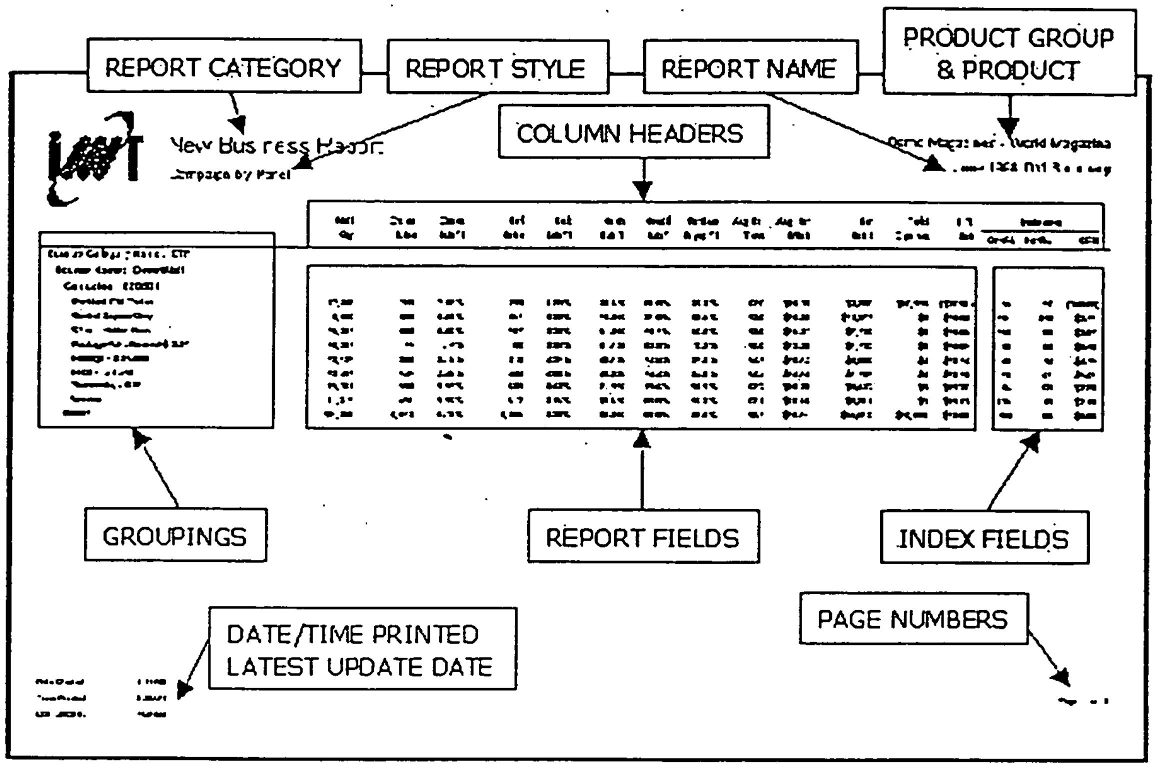
**STEP 3** – SELECT A DIVISION / GROUP

**STEP 4** – SELECT A PRODUCT

**STEP 5** – SELECT A REPORT GROUP
- Click RUN REPORT GROUP to run the all the reports within the specified group.
- Click DELETE REPORT GROUP to delete all the reports within a specified group
- Click **GO** to select a report within a report group

**STEP 6** – SELECT A REPORT
- Click RUN REPORT to run an individual report
- Click DELETE REPORT to delete an individual report


Searches for Selected Criteria In Report
Selects Search Criteria to Search In Report
Refreshes Report from Database
Exports Report
Prints Report
Toggle Group Tree
Selects Page Size Resolution of Report
Goes to Previous Page of Report
Goes to 1st Page of Report
Closes Current View
Page # of Total Page #s of Report
Goes to Next Page of Report
Goes to Last Page of Report
Stops Loading Report
Report Group Tree


REPORT CATEGORY
REPORT STYLE
REPORT NAME
PRODUCT GROUP & PRODUCT
COLUMN HEADERS
GROUPINGS
REPORT FIELDS
INDEX FIELDS
PAGE NUMBERS
DATE/TIME PRINTED
LATEST UPDATE DATE

## OVERVIEW

IMT provides a variety of different **agent** reports for tracking agent production. As is the case with all IMT reports, these reports provide drill-down capabilities, which allow users to simply double-click on a field to view the detail below it. The standard fields on IMT **agent** reports include:

- **Total Subs**
- **Gross $**
- **Net $**
- **Remit %**
- **Avg Term**
- **Avg Price**
- **Expenses**
- **NPN**
- **Rnwl %**
- **Cancels**
- **Reinstates**
- **Net Activity**

For more information about field definitions, or how fields are calculated, please look to the table on the next page or refer to the glossary.

## FIELD DEFINITIONS

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Total Subs** | The total quantity of paid and credit subscriptions. | Summarized | The fulfillment house provides gross Sub quantities. |
| **Gross $** | The dollar value of paid and credit subscriptions. | Summarized | The fulfillment house provides gross Revenue values. |
| **Net $** | The dollar value of paid and credit subscriptions remitted to the publisher by the agent. | Summarized | The fulfillment house provides net Revenue values. |
| **Remit %** | Net $ / Gross $ | Calculated | |
| **Avg Term** | Gross Copies / Total Subs | Calculated | Represents the average copies per subscription. The fulfillment house provides gross Copy quantities. |
| **Avg Price** | Gross $ / Total Subs | Calculated | Represents the average dollar value per subscription. |
| **Expenses** | NA | NA | Expenses are NOT applied to agent reports at this time. |
| **NPN** | (Net $ - Expenses) / Subs | Calculated | Represents the average net (remitted) value of subscriptions. Expenses are NOT included in NPN calculations at this time. |
| **Rnwl %** | Renewal Subs / Total Subs | Calculated | Renewal Subs for Agents are subscriptions that come in from an agent that match an existing record on file. The fulfillment house provides quantities. |
| **Cancels** | The total quantity of cancelled subs. | Summarized | The fulfillment house provides cancel quantities. Cancels correspond to cancellations received from an agent during a production period. Cancels do NOT correspond with Total Subs during the same period. |
| **Reinstates** | The total quantity of reinstated subs. | Summarized | Reinstate quantities are provided by the fulfillment house. Reinstates correspond to cancellations received from an agent during a production period. Reinstates do NOT correspond with Total Subs during the same period. |
| **Net Activity** | Total Subs - Cancels + Reinstates | Calculated | |

## LIST OF AVAILABLE REPORTS

Below is a complete list of **agent** (Other reports are placed here) reports broken down by subcategory.

| REPORTS BY SUB-CATEGORIES | SUB-CATEGORY DESCRIPTION |
|---|---|
| **SUMMARY ANALYSIS**<br>• Publication by Source by Agent by Month<br>• Publication by Agent<br>• Publication by Source Month<br>• Publication by Source by Remit<br>• Publication by Source by Agent<br>• Agent by Publication<br>• Publication by Source<br>• **OTHER REPORTS**<br>  • Starts by Model Source<br>  • Starts by Source<br>  • Available Keys<br>  • Assigned Keys | Agent Summary reports offer the ability to monitor agent production by source, month and remit rate. |

## OVERVIEW

IMT provides a variety of different **billing** reports for analyzing the performance of **billing** sources and campaigns. As is the case with all IMT reports, these reports provide drill-down capabilities, which allow users to simply double-click on a field to view the detail below it. Any campaign for which keys have been assigned is viewable through these reports. The standard fields on IMT **billing** reports include:

- **Max Effort Qty**
- **Bills Mailed**
- **Total Payment**
- **Payment %**
- **Bills-Payment Ratio**
- **Step-Up Qty**
- **Step-Up %**
- **Request Cancel Qty**
- **Request Cancel %**
- **Total Revenue**
- **Total Expense**
- **NPN payment**
- **Payment On Payment**
- **Payment After Cancel**
- **Indexing – Pay-Up%, NPN**

For more information about field definitions, or how fields are calculated, please look to the table on the next page or refer to the glossary.

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Max Effort Qty** | Within a bill series the mail qty from the effort with the highest mailed quantity. | Calculated | Looks across all efforts to select the maximum billing pool size within a billing series. |
| **Bills Mailed** | The number of bills mailed for a particular effort. | Summarized | Bills Mailed quantities are generally provided by the fulfillment house. |
| **Total Paymt** | Represents the total number of payments. | Summarized | The fulfillment house generally provides payments. |
| **Paymt %** | Total Paymt / Bills Mailed<br>or<br>Total Paymt / Max Effort Qty | Calculated | The basis for calculating Paymt % will vary depending on the level and order of groupings.<br>• For individual efforts Bills Mailed is used.<br>• For source, campaign, and panel subtotals, Max Effort Qty is used. |
| **Bills - Paymt Ratio** | Bills Mailed / Total Paymt. | Calculated | Represents the ratio of Bills Mailed to Total Payments. |
| **Step-Up Qty** | Step-ups are generally renewal orders made at the same time as a billing payment, usually in response to an offer on the billing effort. | Summarized | The fulfillment house generally provides step-up quantities. |
| **Step-Up %** | Step-Up Qty / Bills Mailed<br>or<br>Set-Up Qty / Max Effort Qty | Calculated | The basis for calculating Step-up % will vary depending on the level and order of groupings.<br>• For individual efforts Bills Mailed is used.<br>• For source, campaign, and panel subtotals, Max Effort Qty is used. |
| **Req Cncl** | Request Cancels are cancels made by a subscriber. | Summarized | The fulfillment house generally provides Req Cncl quantities. |
| **Req Cncl %** | Req Cncl / Bills Mailed<br>or<br>Req Cncl / Max Effort Qty | Calculated | The method used to calculate Req Cncl % will vary depending on the level and order of groupings |

## FIELD DEFINITIONS - CONTINUED

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Total Revenue** | Total payment dollars. | Summarized | The fulfillment house generally provides revenue quantities. |
| **Total Expenses** | Lettershop Costs+ Postage In + Postage Out + Premium Costs + Print Costs + Subs Service +Other Costs + Billing Costs + Bad Pay Costs + List Costs | Calculated | Expenses are dependent on (1) the association of an Expense Set to a campaign, panel or key, and (2) the values and settings that define an Expense Set.<br><br>Note: List Costs are the only expense item NOT reliant on an Expense Set. List Costs are applied directly to a key, and are calculated using either the mail qty or merge/purge qty as a basis. |
| **NPN Payment** | (Net Revenue - Total Expense) / Total Paymt | Calculated | Represents the average revenue per net payment. |
| **Pymt on Pymt** | A payment on payment is a second payment made on the same billing effort or series. | Summarized | The fulfillment house generally provides Payment On Payment quantities. |
| **Pymt After Cancel** | A payment after cancel is a payment made after a request cancel has been processed. | Summarized | The fulfillment house generally provides Payment After Cancel quantities. |
| **Indexes** | | | |

## LIST OF AVAILABLE REPORTS

**Billing** reports are grouped into subcategories, ranging from high-level summary analysis to low-level effort analysis. Below is a complete list of **billing** reports broken down by subcategory.

| REPORT SUB-CATEGORIES | DESCRIPTION |
|---|---|
| **SUMMARY ANALYSIS**<br>• Source by Current Source | Summary Analysis reports offer high-level views at the current source level. These reports are useful for comparing the overall performance of sources across credit periods. |
| **CREDIT PERIOD ANALYSIS**<br>• Source by Credit Period<br>• Source by Current Source by Credit Period | Credit Period Analysis reports offer views at the credit period (campaign) level. These reports are useful for evaluating billing performance for a set of credit periods over a period of time. |
| **PANEL ANALYSIS**<br>• Current Source by Effort by Panel<br>• Current Source by Panel | Panel Analysis reports offer views at the panel level. These reports are useful for comparing and evaluating panels within credit periods (campaigns), especially important when performing test panel analysis. |
| **EFFORT ANALYSIS**<br>• Panel by Effort<br>• Source by Current Source by Effort<br>• Source by Credit Period by Effort<br>• Source by Effort by Current Source | Effort Analysis reports offer views at the effort level. These reports are useful for evaluating the performance of billing efforts for a group of credit periods or sources, or within credit periods over time. |
| **CHECKING REPORTS**<br>• Campaign Setup<br>• Sourcekey Assignment | Effort Analysis reports offer views at the effort level. These reports are useful for evaluating the performance of billing efforts for a group of credit periods or sources, or within credit periods over time. |

IMT provides a variety of different **DTP** (Direct to Publisher) Reports for analyzing the performance of **DTP** sources and campaigns. As is the case with all IMT reports, these reports provide drill-down capabilities, which allow users to simply double-click on a field to view the detail below it. Any campaign for which keys have been assigned is viewable through these reports. The standard fields on IMT **DTP** reports include:

- **Mail Qty**
- **Gross Subs**
- **Gross Sub %**
- **Net Subs**
- **Net Sub %**
- **Cash Sub %**
- **Credit Sub %**
- **Total Sub Payup %**
- **Average Net Term**
- **Average Net $/Sub**
- **Net Sub $**
- **Total Expense**
- **NPN Sub**
- **Indexing – Grs%, Net %, NPN**

For more information about field definitions, or how fields are calculated, please look to the table on the next page or refer to the glossary.

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Mail Qty** | Represents the quantity of promotions sent to a group of subscribers. | Summarized | The fulfillment house typically provides mail Qty. There is an option within Admin to override the fulfillment house mail quantity with an Override Mail quantity. Our formula will automatically use the Override Mail quantity if a value has been entered; otherwise we will use the mail quantity from the fulfillment house. |
| **Gross Subs** | Represents the number of paid and credit subscriptions sold. | Summarized | Gross subscription quantities are typically provided by the fulfillment. |
| **Gross Sub %** | Gross Subs / Total Mail Qty | Calculated | There are several ways users can influence the way Gross Sub % is calculated:<br>1. If the user provides a Mail Qty Override quantity, then Mail Qty Override is used instead of the Mail Qty.<br>2. If "Newsstand Sale Qty" has been entered at the key level and response based on Sale "Y" Draw "N" is set to "Y" then the Newsstand Sale qty is used instead of substitute the Mail Qty.<br>3. In addition, there is an option to affect the way Gross Sub % is calculated for subtotal groupings. By default the system assumes ALL promotion keys will contribute to the total mail quantity, if the Subtotal Flag on a key is set to "FALSE" the mail qty for that key will not be involved in the total mail qty. Adjusting the subtotal flags is particularly useful for Insert Card reporting. |
| **Net Subs** | Represents the number of paid subscriptions sold (cash plus paid credit). | Summarized | Net subscription quantities are typically provided by the fulfillment. |
| **Net Sub %** | Net Subs / Total Mail Qty | Calculated | There are several ways users can influence the way Net Sub % is calculated – see comments for Gross Sub %. |

## FIELD DEFINITIONS - CONTINUED

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Cash Sub %** | Cash Subs / Gross Subs | Calculated | Represents the number of Cash Subscriptions as a percentage of Gross Subscriptions. Cash Subs are subscriptions received with money. Cash Sub quantities are generally provided by the fulfillment house. |
| **Credit Sub %** | Credit Subs / Gross Subs | Calculated | Represents the number of Credit Subs as a percentage of Gross Subs. Credit Sub quantities are generally provided by the fulfillment house. |
| **Total Sub Payup %** | Net Subs / Gross Subs | Calculated | Net Subs include both cash and paid credit. |
| **Avg Net Term** | Net Copies / Net Subs | Calculated | Represents the average number of copies per net subscription. The fulfillment house generally provides gross Sub Copy quantities. |
| **Avg $ / Net Sub** | Net Revenue / Net Subs | Calculated | Net Revenue represents the dollar value for net subscriptions. Net Revenue is generally provided by fulfillment house. |
| **Net Sub $** | Total Net Revenue | Summarized | Total Net Revenue is generally provided by the fulfillment house and represents the total dollar value of net subscriptions sold. |
| **Total Expenses** | Lettershop Costs+ Postage In + Postage Out + Premium Costs + Print Costs + Subs Service +Other Costs + Billing Costs + Bad Pay Costs + List Costs | Calculated | Expenses are dependent on (1) the association of an Expense Set to a campaign, panel or key, and (2) the values and settings that define an Expense Set.<br><br>Note: List Costs are the only expense item NOT reliant on an Expense Set. List Costs are applied directly to a key, and are calculated using either the mail qty or merge/purge qty as a basis. |
| **NPN Sub** | (Net Revenue - Total Expense) / Net Subs | Calculated | Represents the average profit per net subscription sold. |
| **Indexes** | | | |

# LIST OF AVAILABLE REPORTS

**DTP** reports are grouped into subcategories, ranging from high-level summary analysis to low-level list analysis. Below is a complete list of **DTP** reports broken down by subcategory.

| REPORT CATEGORY | DESCRIPTION |
|---|---|
| **SUMMARY ANALYSIS**<br>• Source Category by Source | Summary Analysis reports offer high-level views at the source level. These reports are useful for comparing the overall performance of sources across campaigns. |
| **CAMPAIGN ANALYSIS**<br>• Source by Campaign<br>• Source by Campaign Type by Campaign | Campaign Analysis reports offer views at the campaign level. These reports are useful for evaluating campaign either individually or over a period of time. |
| **PANEL ANALYSIS**<br>• Campaign by Panel Type by Test Type<br>• Campaign by Panel<br>• Campaign by Panel Subtype<br>• Campaign by Panel Subtype by Panel<br>• Campaign by Panel Test Type<br>• Campaign by Panel Test Type by Panel<br>• Campaign by Panel Type<br>• Campaign by Panel Type by Panel<br>• Panel Type by Panel<br>• Panel Type by Panel Subtype | Panel Analysis reports offer views at the panel level. These reports are useful for comparing and evaluating panels within campaigns, especially important when performing test panel analysis. |
| **KEY ANALYSIS**<br>• Campaign by Panel by Key | Key Analysis reports offer views at the key level. These reports are useful for comparing and evaluating source keys and lists. |
| **LIST ANALYSIS**<br>• List by List Segment<br>• List by List Segment by Campaign<br>• List Category by List<br>• List Category by List by List Segment<br>• List History (by List and Segment)<br>• Campaign by List<br>• Campaign by Panel by List<br>• Campaign by Panel by List and Segment<br>• Campaign by Panel by List by List Segment<br>• List by Campaign | List Analysis reports offer views at the key level, with a specific focus on lists. These reports are particularly useful for evaluating the performance of list and list segments within a specific campaign, plus provide the ability to analyze the performance of list over time. |
| **PACKAGE ANALYSIS**<br>• Source by Panel Type by Package | Package Analysis enables comparison of creative within a source. |
| **CROSS TITLE ANALYSIS**<br>• List by Title<br>• Source by Campaign Month by Title<br>• Source by Title | Cross Title Analysis offer views at the source and campaign level. These reports are specifically designed to compare how titles are performing within the same sources. |
| **CHECKING REPORTS**<br>• Campaign Setup<br>• Sourcekey Assignment | Cross Title Analysis offer views at the source and campaign level. These reports are specifically designed to compare how titles are performing within the same sources. |
| **INTERNET**<br>• Campaign by Panel by Key<br>• Campaign Type by Campaign | Cross Title Analysis offer views at the source and campaign level. These reports are specifically designed to compare how titles are performing within the same sources. |

## OVERVIEW

IMT provides a variety of different **gift** reports for analyzing the performance of **gift** sources and campaigns. As is the case with all IMT reports, these reports provide drill-down capabilities, which allow users to simply double-click on a field to view the detail below it. Any campaign for which keys have been assigned is viewable through these reports. The standard fields on IMT **gift** reports include:

- **Mail Qty**
- **Gross Orders**
- **Gross Orders%**
- **Gross Subs**
- **Gross Subs %**
- **Total Net Subs**
- **Net Sub %**
- **Total Payup %**
- **Cash Sub %**
- **Credit Sub %**
- **Avg Net Term**
- **Avg Net $/Sub**
- **Sub-Ord Ratio**
- **Net Subs $**
- **NPN Sub**
- **Indexing – GrOrds%, Gr Sub %, NPN**

For more information about field definitions, or how fields are calculated, please look to the table on the next page or refer to the glossary.

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Mail Qty** | Represents the quantity of promotions sent to a group of subscribers. | Summarized | The fulfillment house typically provides mail Qty. There is an option within Admin to override the fulfillment house mail quantity with an Override Mail quantity. Our formula will automatically use the Override Mail quantity if a value has been entered; otherwise we will use the mail quantity from the fulfillment house. |
| **Gross Orders** | Represents the number of paid and credit subscription orders (donor responses). An order may include more than one subscription | Summarized | Gross Order quantities are generally provided by the fulfillment house |
| **Gross Order %** | Gross Orders / Total Mail Quantity | Calculated | There are several ways users can influence the way Gross Sub % is calculated -- see comments for Gross Sub % |
| **Gross Subs** | Represents the number of paid and credit subscriptions sold (donees and subscribing donors) | Summarized | Gross Sub quantities are generally provided by the fulfillment house |
| **Gross Sub %** | Gross Subs / Total Mail Qty | Calculated | There are several ways users can influence the way Gross Sub % is calculated:<br>1. If the user provides a Mail Qty Override quantity, then Mail Qty Override is used instead of the Mail Qty.<br>2. In addition, there is an option to affect the way Gross Sub % is calculated for subtotal groupings. By default the system assumes ALL promotion keys will contribute to the total mail quantity, unless the Subtotal Flag on a key is set to "FALSE" the mail qty for that key will not be involved in the total mail qty. Adjusting the subtotal flags is particularly useful for Insert Card reporting. |

## FIELD DEFINITIONS - CONTINUED

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Total Net Subs** | Represents the number of paid subscriptions sold (cash plus paid credit). | Summarized | Net subscription quantities are typically provided by the fulfillment. |
| **Net Sub %** | Net Subs / Total Mail Qty | Calculated | There are several ways users can influence the way Net Sub % is calculated -- see comments for Gross Sub %. |
| **Total Payup %** | Net Subs / Gross Subs | Calculated | Net Subs include both cash and paid credit. |
| **Cash Sub %** | Cash Subs / Gross Subs | Calculated | Represents the number of Cash Subscriptions as a percentage of Gross Subscriptions. Cash Subs are subscriptions received with money. Cash Sub quantities are generally provided by the fulfillment house. |
| **Credit Sub %** | Credit Subs / Gross Subs | Calculated | Represents the number of Credit Subs as a percentage of Gross Subs. Credit Sub quantities are generally provided by the fulfillment house. |
| **Avg Net Term** | Net Copies / Net Subs | Calculated | Represents the average number of copies per Net subscription. The fulfillment house generally provides gross Sub Copy quantities. |
| **Avg Net$ / Sub** | Net Revenue / Net Subs | Calculated | Net Revenue represents the dollar value for Net subscriptions. Net Revenue is generally provided by fulfillment house. |
| **Sub-Ord Ratio** | Gross Sub / Gross Orders | Calculated | Represents the ratio of Gross Subs (donee+donor renewal order) to Gross Orders. |
| **Net Sub $** | Total Net Revenue | Summarized | Total Net Revenue is generally provided by the fulfillment house and represents the total dollar value of net subscriptions sold. |
| **NPN Sub** | (Net Revenue - Total Expense) / Net Subs | Calculated | Represents the average profit per net subscription sold. |
| **Indexes** | | | |

## LIST OF AVAILABLE REPORTS

**Gift** reports are grouped into subcategories, ranging from high-level summary analysis to low-level list analysis. Below is a complete list of **gift** reports broken down by subcategory.

| REPORT CATEGORY | DESCRIPTION |
|---|---|
| **SUMMARY ANALYSIS**<br>• Source Category by Source | Summary Analysis reports offer high-level views at the source level. These reports are useful for comparing the overall performance of sources across campaigns. |
| **CAMPAIGN ANALYSIS**<br>• Campaign Type by Campaign<br>• Source by Campaign | Campaign Analysis reports offer views at the campaign level. These reports are useful for evaluating campaign either individually or over a period of time. |
| **PANEL ANALYSIS**<br>• Campaign by Panel<br>• Campaign by Panel Subtype<br>• Campaign by Panel Subtype by Panel<br>• Campaign by Panel Type<br>• Campaign by Panel Type by Panel<br>• Campaign by Test Type<br>• Campaign by Test Type by Panel | Panel Analysis reports offer views at the panel level. These reports are useful for comparing and evaluating panels within campaigns, especially important when performing test panel analysis. |
| **EFFORT ANALYSIS**<br>• Source by Campaign by Effort<br>• Source by Effort<br>• Campaign by Panel by Effort<br>• Source by Effort by Campaign | Effort Analysis reports offer views at the effort level. These reports are useful for evaluating the performance of efforts within a particular campaign, or for a group of campaigns. |
| **KEY ANALYSIS**<br>• Campaign by Panel by List<br>• Campaign by Panel by Key | Key Analysis reports offer views at the key level. These reports are useful for comparing and evaluating source keys and lists. |
| **CROSS TITLE ANALYSIS**<br>• Source by Title | Cross Title Analysis offer views at the source and campaign level. These reports are specifically designed to compare how titles are performing within the same sources. |
| **CHECKING REPORTS**<br>• Campaign Setup<br>• Sourcekey Assignment | |

# OVERVIEW

IMT provides a variety of different **renewal** reports for analyzing the performance of **renewal** sources and campaigns. As is the case with all IMT reports, these reports provide drill-down capabilities, which allow users to simply double-click on a field to view the detail below it. Any campaign for which keys have been assigned is viewable through these reports. The standard fields on IMT **renewal** reports include:

- Est. Max Effort Qty
- Total Mail Qty
- Gross Subs
- Gross Sub %
- Net Subs
- Net Sub %
- Cash Sub %
- Credit Sub %
- Total Sub Payup %
- Avg Term
- Avg $/Sub
- Net Sub $
- Expenses
- NPN sub
- Indexing – Grs %, Net %, NPN

For more information about field definitions, or how fields are calculated, please look to the table on the next page or refer to the glossary.

## FIELD DEFINITIONS

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Est. Max Effort Qty** | The largest mail quantity of a prior source group and renewal series within an expire pool. | Calculated | IMT automatically calculates the maximum effort by looking within an expire pool and finding the maximum mail quantity by prior source, regardless of the effort number. For example:<br>Expire 380<br><br>Prior Source A<br>Effort 1 = 100<br>Effort 2 = 90<br>Max Effort = 100<br><br>Prior Source B<br>Effort 1 = 90<br>Effort 2 = 100<br>Max Effort = 100<br>Total Max Effort = 200 |
| **Total Mail Qty** | Represents the quantity of promotions sent to a group of subscribers. | Summarized | The fulfillment house typically provides mail Qty. There is an option within Admin to override the fulfillment house mail quantity with an Override Mail quantity, however this is generally not utilized for renewals. |
| **Gross Subs** | Represents the number of paid and credit subscriptions sold. | Summarized | Gross subscription quantities are typically provided by the fulfillment. |
| **Gross Sub %** | Gross Subs / Total Mail Qty<br>or<br>Gross Sub / Est. Max Effort Qty | Calculated | The basis for calculating Gross Sub % will vary depending on the level and order of groupings.<br>• For individual efforts Total Mail Qty is used.<br>• For source, campaign, and panel subtotals, Est. Max Effort Qty is used. |
| **Net Subs** | Represents the number of paid subscriptions sold (cash plus paid credit). | Summarized | Net subscription quantities are typically provided by the fulfillment. |

## FIELD DEFINITIONS - CONTINUED

| FIELD | DEFINITION / CALC METHOD | TYPE | COMMENT |
|---|---|---|---|
| **Net Sub %** | Net Subs / Total Mail Qty<br>or<br>Net Sub / Est. Max Effort Qty | Calculated | The basis for calculating Net Sub % will vary depending on the level and order of groupings.<br>• For individual efforts Total Mail Qty is used.<br>• For source, campaign, and panel subtotals, Est. Max Effort Qty is used. |
| **Cash Sub %** | Cash Subs / Gross Subs | Calculated | Represents the number of Cash Subscriptions as a percentage of Gross Subscriptions. Cash Subs are subscriptions received with money. Cash Sub quantities are generally provided by the fulfillment house. |
| **Credit Sub %** | Credit Subs / Gross Subs | Calculated | Represents the number of Credit Subs as a percentage of Gross Subs. Credit Sub quantities are generally provided by the fulfillment house. |
| **Total Sub Payup %** | Net Subs / Gross Subs | Calculated | Net Subs include both cash and paid credit. |
| **Avg Term** | Gross Copies / Gross Subs | Calculated | Represents the average number of copies per gross subscription. The fulfillment house generally provides gross Sub Copy quantities. |
| **Avg $ / Sub** | Gross Revenue / Gross Subs | Calculated | Gross Revenue represents the dollar value for gross subscriptions. Gross Revenue is generally provided by fulfillment house. |
| **Net Sub $** | Total Net Revenue | Summarized | Total Net Revenue is generally provided by the fulfillment house and represents the total dollar value of net subscriptions sold. |
| **Expenses** | Lettershop Costs+ Postage In + Postage Out + Premium Costs + Print Costs + Subs Service +Other Costs + Billing Costs + Bad Pay Costs + List Costs | Calculated | Expenses are dependent on (1) the association of an Expense Set to a campaign, panel or key, and (2) the values and settings that define an Expense Set.<br>Note: List Costs are the only expense item NOT reliant on an Expense Set. List Costs are applied directly to a key, and are calculated using either the mail qty or merge/purge qty as a basis. |
| **NPN Sub** | (Net Revenue - Total Expense) / Net Subs | Calculated | Represents the average profit per net subscription sold. |
| **Indexes** | | | |

# LIST OF AVAILABLE REPORTS

**Renewal** reports are grouped into subcategories, ranging from high-level summary analysis to low-level effort analysis. Below is a complete list of **renewal** reports broken down by subcategory.

| REPORT CATEGORY | DESCRIPTION |
|---|---|
| **SUMMERY ANALYSIS**<br>• Source Category by Prior Source<br>• Source Category by Source<br>• Source Category by Source by Prior Source | Summary Analysis reports offer high-level views at the source level. These reports are useful for comparing the overall performance of source across expires (campaigns). |
| **EXPIRE ANALYSIS**<br>• Expire by Source<br>• Source by Expire by Prior Source<br>• Source by Expire | Campaign Analysis reports offer views at the expire level. These reports are useful for evaluating expires (campaigns) either individually or over a period of time. |
| **PANEL ANALYSIS**<br>• Source by Expire by Effort by Panel<br>• Source by Expire by Panel by Effort<br>• Source by Expire by Panel<br>• Source by Expire by Prior Source by Panel | Panel Analysis reports offer views at the panel level. These reports are useful for comparing and evaluating panels within expires (campaigns), especially important when performing test panel analysis. |
| **EFFORT ANALYSIS**<br>• Prior Source by Effort<br>• Source by Effort<br>• Source by Effort by Prior Source<br>• Source by Expire by Effort<br>• Source by Prior Source by Effort | Effort Analysis reports offer views at the effort level. These reports are useful for evaluating the performance of efforts in an expire, or over time for a group of expires. |
| **TRENDING ANALYSIS**<br>• Source by Effort by Expire<br>• Source by Prior Source by Expire | Trending Analysis reports offer views at the effort and prior source level. These reports are useful for evaluating the performance of efforts and prior sources over time for a group of expires. |
| **CROSS TITLE ANALYSIS**<br>• Prior Source by Title<br>• Title by Prior Source<br>• Source by Title<br>• Source by Group | Cross Title Analysis offer views at the source and campaign level. These reports are specifically designed to compare how titles are performing within the same sources. |
| **CHECKING REPORTS**<br>• Sourcekey Assignment<br>• Campaign Setup | |

| TERM | DEFINITION | EXAMPLES |
|---|---|---|
| **A** | | |
| Available Keys | Set of active Source Keys that have not yet been assigned to a Panel | • See pages 8 & 14 |
| Avg Net $/Sub | Net Revenue ÷ Net Subscriptions | • $12.00 |
| Avg Net Term | Net Copies ÷ Net Subscriptions | • 12.0 |
| **B** | | |
| Browser | Application that allows you to view information on the internet. | • Internet Explorer (IE) |
| **C** | | |
| Campaign | Marketing initiative consisting of one or more panels | • 2000-01 Direct Mail<br>• 2000-01 Insert Cards |
| Campaign Status | Progress status of your campaign | • Open<br>• Closed<br>• Pending |
| Campaign Type | Broad type classification of a Campaign which is user defined and can differ between sources | • Winter DM<br>• Hotline |
| Company | Corporation, Inc., LLC, etc... | • ABC Direct Marketing Company |
| Cash Sub % | Cash Subscriptions ÷ Gross Subscriptions | • 40% |
| Control Panel | Current offer / creative used as the standard against which to test any new offer / creative | • Control |
| CPM | Cost per 1000 (M) | • $75.00 |
| CPU | Cost per Unit | • $1.50 |
| Credit Sub % | Credit Subscriptions ÷ Gross Subscriptions | • 85.3% |

| TERM | DEFINITION | EXAMPLES |
|---|---|---|
| **D** | | |
| Drill Down | Data selection method in which you filter or 'drill' through your data by selecting specific criteria | • See page 8<br>• Run a report and double click on a Campaign Name and it will reveal the Panels within a Campaign, continue and you can drill down to the key |
| Division | Group of Products within a Company | • Magazine Division<br>• Book Division |
| **E** | | |
| Edit View Screen | Screen in which you edit or delete records in Admin tables | • See pages 15 - 18 |
| Expense Set | Set of expenses which can be applied to a Campaign, Panel or Key | • 2000-01 DM 6x9 Package Expense<br>• Triple Insert Expense |
| Est. Max Mail Qty | Maximum quantity mailed between efforts within a Panel for all levels above effort | • Renewal Field Definitions – Page 49 |
| **F** | | |
| Fast Find | Direct method to locate Sources, Campaigns and Panels within IMT Admin | • See page 8 |
| Filter Keys | Process of selecting specific Source Keys that you want to assign to a panel | • See page 14 |
| **G** | | |
| Gross Subs | Total quantity of subs, cash + credit | • 1000 |
| Group | Grouping of related products within a Division | • Arts Group<br>• Outdoor Group |
| Group Edit | Feature that allows user to edit groups of records at one time | • See Pages 15 – 18 |
| Gross Sub % | Gross subscriptions ÷ Mail Qty | • 60% |
| **L** | | |
| List | Source of list rental names | • Tattooing Weekly<br>• Money Monthly |
| List Category | Broad category of related Lists | • House Lists<br>• Outside Lists |
| List Segment | Specific selection from a List | • Paid Subscribers<br>• 3 Month Buyers |
| List Cost Factor | Provides the ability to calculate list expenses by factoring a percentage higher (or lower) | • If you have defined your actual list costs at $100/M, but you want your reports to reflect a list cost of $110/M, then would apply a factor 1.1 |

| TERM | DEFINITION | EXAMPLES |
|---|---|---|
| **M** | | |
| Mail Qty | Quantity of Packages mailed for a specific Campaign, Panel, or Promotion Key | • 1,000,000 Control Panel<br>• 15,000 Test Panel 1 |
| Multi-Edit | Feature that allow user to edit one or more records at a time | • See Page 15 - 18 |
| **N** | | |
| Net Sub $ | Net subscription revenue (cash + paid credit subscriptions) for a Campaign, Panel, or Promotion Key | • $12,220 |
| Net Sub % | Net Subscriptions ÷ Mail Qty | • 1.05% |
| NPN Sub | Net per Net Subscribers | • (Net Sub Rev – Total Exp) ÷ Net Subs = NPN Sub |
| NPN Pymt | Net Per Net Payment | • (Total Rev - Total Exp) ÷ Total Pymt = NPN Pymt |
| **O** | | |
| Optional Effort ID | Provides the ability to assign an effort sequence to keys. This is only valid for GIFT sources. | • Alphanumeric ID |
| **P** | | |
| Panel | Sub-grouping within a Campaign | • New Creative Panel<br>• Savings Certificate |
| Panel Type | Set of related Panels typically used to distinguish Control Panels from Test Panels | • Control<br>• Test<br>• Newsstand |
| Panel Subtype | Another field used to further define a set of related Panels | • Sweepstakes<br>• Bind-in |
| Promotion Key<br>- A.K.A -<br>Source Key<br>Data Key<br>Document Key | Alphanumeric code that labels the element(s) to be measured in a Campaign. Source Keys are originated at fulfillment houses and standardized by IMT | • 6KA2_0526<br>• 41B2_08/21/2000 |
| Panel Test Type | Field used to define a set of related Panels by test method | • Price<br>• Offer |
| Panel Package | Defines your package type | • 6x9 green |
| Product Group | Grouping of products within a Division | • Magazines<br>• Books |
| Pymt on Pymt | Duplicate payment | • |
| Pay After Cancel | Payment received after subscription canceled | • Sub sends a payment when sub has been stopped |

| TERM | DEFINITION | EXAMPLES |
|---|---|---|
| **R** | | |
| Request Cncl | Gross Subscribers who have requested their Subscription to be canceled | • 100 |
| Request Cncl % | Request Cncl ÷ Gross Subs | • 30% |
| Revenue Set | Revenue over and above Subscription revenue, applied to a Campaign, Panel or Key | • List Rental Revenue<br>• Advertising Revenue |
| **S** | | |
| Setup Table | Tables which are used to define Campaigns, Panels or Keys in more detail (optional fields)<br><br>See pages 9 - 10 | • AutoAdmin Setup<br>• Campaign Status<br>• Campaign Type<br>• Expense Set<br>• List Category<br>• List Name<br>• List Segment<br>• Panel Package<br>• Panel Sub Type<br>• Panel Test Type<br>• Panel Type<br>• Revenue Set<br>• Source Description<br>• Prior/Current Source Description |
| Source | Specific channel of sale | • Direct Mail<br>• Renewals |
| Source Category | Grouping of Sources (defined by IMT) | • Agents<br>• Billing<br>• DTP<br>• Gifts<br>• Renewals |
| Sub Value | Dollar value of a sale of a Product or service for a specific time period | • $14.95 / 1 Year<br>• $24.00 / 2 Year |
| Step Up Qty | Renewal at Birth or Duplicate Payment | • 50 orders |
| Step Up % | Step Up Quantity ÷Bills Mailed | • 5% |
| Subscription | Sale of a Product or service for a specific time period | • Monthly paying customer/member |
| Subtotal Flag | Used as a marker for calculating the mail quantity for subtotal. If the subtotal flag is set to False, then that key's mail quantity will NOT be included in subtotals | • Used monthly for Insert Cards |
| Subtype | Same as Panel Type | • See Panel Type |
| Sub – Ord Ratio | Subscriptions (donees) / Orders (donor) Ratio | • Gross Sub ÷ Gross Orders = Sub-Ord Ratio |

| TERM | DEFINITION | EXAMPLES |
|---|---|---|
| **T** | | |
| Term Value | Number of issues sold for a specific subscription sale | • 12 Issues / 1 Year<br>• 24 Issues / 2 Years |
| Test Panel | New offer / creative tested against control | • Smith 6x11, 14/$35.00 12/23/99 |
| Total Rev | Total Revenue on Payments | • $2,200 |
| Total Exp | Total cost of a number of individual expense items | • Lettershop + Printing + Postage Out + Postage In + Premium + Bad Pay + Billing + Subs Service + Expenses Other + List Expense = Total Exp |
| Total Net Subs | Gross Subs that have paid, includes, Cash and Paid Credit Subscriptions | • 50% cash<br>• 50% paid credit<br>• 75% = Total Net Subs |
| Total Sub Pay up % | Net Subs ÷ Gross Subs | • 50% |

Successful companies understand that knowing their customers, responding to their needs, and capitalizing on market share is the key to success. It's a belief that we share at IMT, because we know that "integrated marketing information is powerful". With a focus on the bottom line, our cutting-edge systems are used by some of the most progressive subscription-based companies today.

**IMT Reporting**
Provides highly segmented, clearly defined marketing analysis at almost any level – from source channel to campaign to list – regardless of the database size.

**IMT Modeling**
A sophisticated tool that businesses use to forecast trends and play what-if scenarios, with an emphasis on lifetime customer value.

**Consulting Services**
Services range from database design, business forecasting, retention program development, to strategic operations analysis.

- AGENT
- BILLING
- DTP
- GIFT
- RENEWAL